Arizona Department of Health Services

Bureau of Nutrition and Physical Activity

AIM WIC System

Training Manual

Super User Student

2011

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Chapter 1: AIM Issues & Troubleshooting

Chapter Preview:

In this chapter we will review common AIM messages including error messages and what they mean. In addition we will cover common AIM issues and how to troubleshoot and resolve them. Section 3 covers out-of-state transfers and what to do if a client has been in the AIM system before.

Chapter Objectives:

Upon completion of this chapter you will be able to:

- Recognize common AIM messages including error messages.
- Troubleshoot and resolve common AIM issues.
- Perform and out-of-state transfer for clients that have already been in AIM before.

Section 1: AIM Messages

Section Concepts:

AIM has both standard messages and error messages. This section reviews the message you will come across on a daily basis and what to do about them.

CLIENT REG SCREEN

"Income collection date must be today's date" error message

What could be happening?

Issue is a result of walking away from the workstation and not logging out of AIM. Users click OK to the message and it keeps coming up.

If you think this is happening, you could try…

Logging off of the system.

Steps to take:

1. Double click on the Citrix icon (shown with the **Red arrow** below) in the lower toolbar.
2. Click on the Logoff button on the right side of the screen.
3. Click Yes to the "Are you sure you want to logoff xxxxxxxxxx?" message.

Special Note: This process may need to be repeated several times.

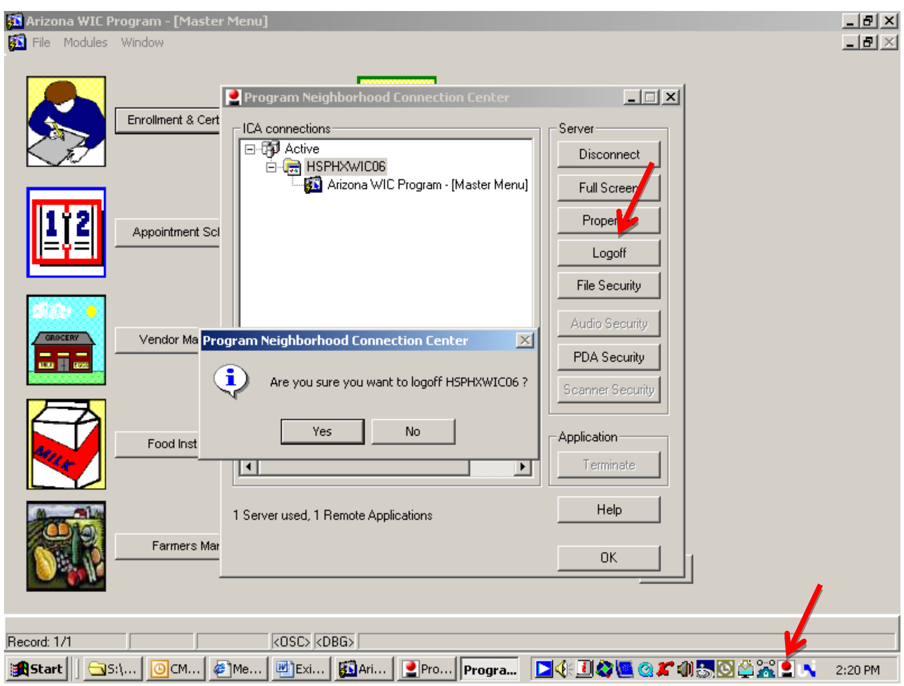


Figure 1 – Citrix Logoff

Client is not showing "Income Ineligible" message when income is over guidelines

What could be happening?

Sometimes an adjunctively eligible program is listed in a family member's record from a previous certification.

If you think this is happening, you could try…

To delete any old or inaccurate program information.

Steps to take:

Deleting Inaccurate or Outdated Adjunctive Eligible Programs:

1. Navigate to the Client Reg screen and then click on Eligibility.
2. Highlight the Program code, for example: C (AHCCCS).
3. Click on the **Red X** in the AIM toolbar to remove the Program.
4. Click on the Save (disk) icon.
5. Repeat for every family member.

CERT ACTION AND TERMINATION SCREENS

“Clients are not linked” pop-up in the On Demand screen and mom’s ID number is in the infant’s record

What could be happening?

When this pop-up occurs, usually it means that the birth date for the infant and the actual delivery date for the mother do not match.

If you think this has happened, you could try…

Making sure the mother’s actual delivery date matches the infant’s birthday.

Steps to take:

1. Verify the infant’s birth date and make sure it is correct in AIM.
2. Check the mother’s record to see if her actual delivery date matches her infant’s birth date.
3. If the infant’s birth date is incorrect, follow the steps listed in the Issue: Wrong Date of Birth or Category (on same day as certification).
4. If the mother’s actual delivery date is incorrect, go to the Cert Action screen in her record and type in the correct delivery date.
5. Click Save (disk) icon.

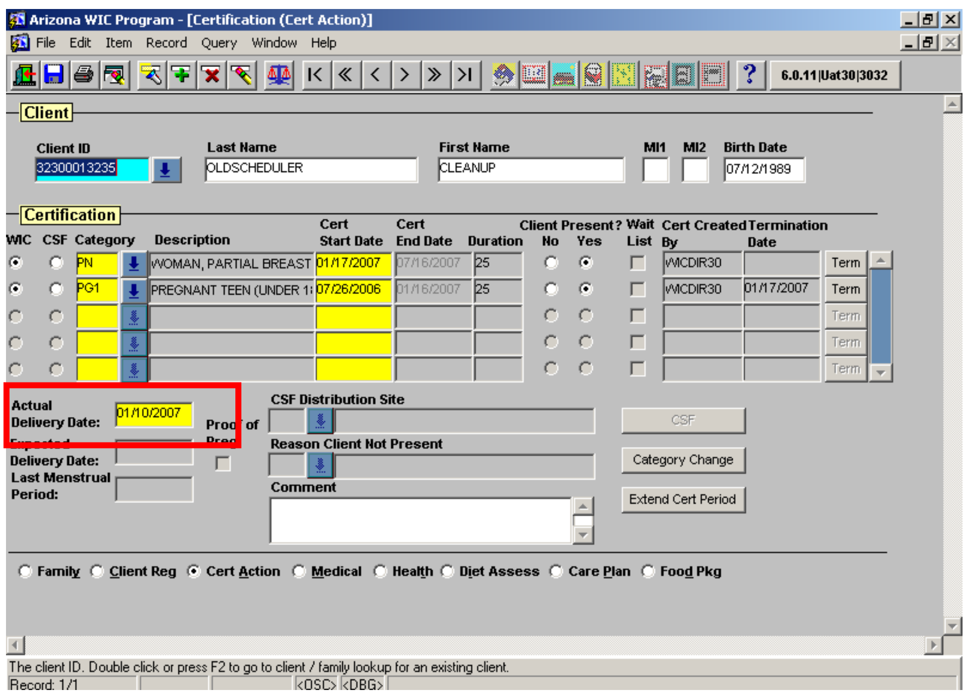


Figure 2 – Actual Delivery Date

HEALTH SCREEN

The Abuse Flag error appears when calculating risks in the Health History screen

What could be happening?

Usually, an Abuse Flag message displays because:

a. A category change in a current certification from Exclusive or Partial Breastfeeding (EN or PN) to Postpartum (P) caused the client to have no risks because the old risk was associated with her breastfeeding status. This means that in order to calculate new risks, you have to complete a new Health History.

b. The system is looking for a new Health History date (not just a Health Risk Factor date) because the category information in the Health History doesn't match with the category on the Cert Action screen.

If you think this has happened, you could try…

Entering new health history and tobacco information.

Steps to take:

1. Go to the client's Health screen and enter a new Health History Date (**Green +**) and proceed to answer Health History questions.
    a. Be sure to answer the breastfeeding questions so that they reflect the category change in the Cert Action screen.
2. Click OK.
3. Update the Tobacco Date (**Green +**), and proceed to answer Tobacco questions.
4. Click Save (disk) icon.

To prevent this error in the future you could….

Assign all appropriate risks at initial certification. Ensuring all risks are assigned will help avoid this error when a category changes from Exclusive or Partial Breastfeeding (EN or PN) to Postpartum (P).

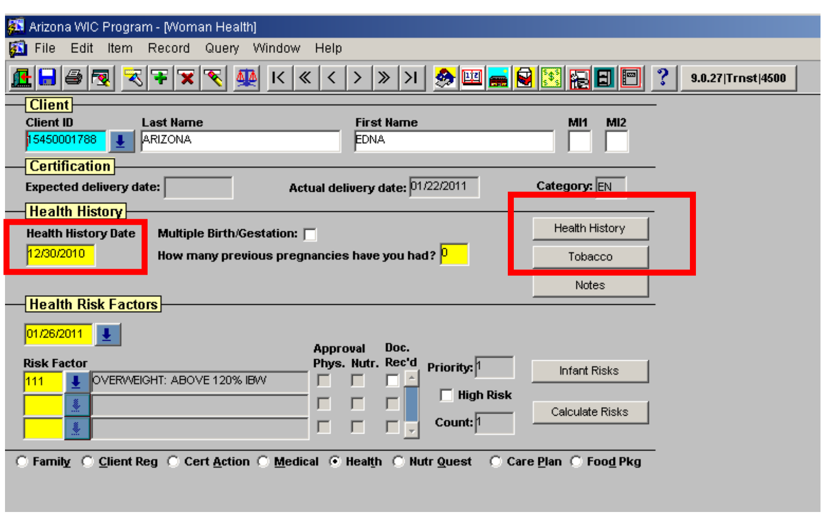


Figure 3 – Health History

ON DEMAND/UNIPRINT – ISSUES

Breastfeeding Surveillance error message for question 3 "The age the baby stopped breastfeeding cannot be less than the last time the mother said she was still breastfeeding"

What's happening?

You feel that no matter what range you place in the system, an error comes up stating "The age the baby stopped breastfeeding cannot be less than the last time the mother said she was still breastfeeding."

What can you do?

Double check the current information against the last time the client answered the breastfeeding surveillance questions (i.e. received Food Instruments).

Steps to take:

1. Obtain the current age of the infant/child from the Client Reg screen.

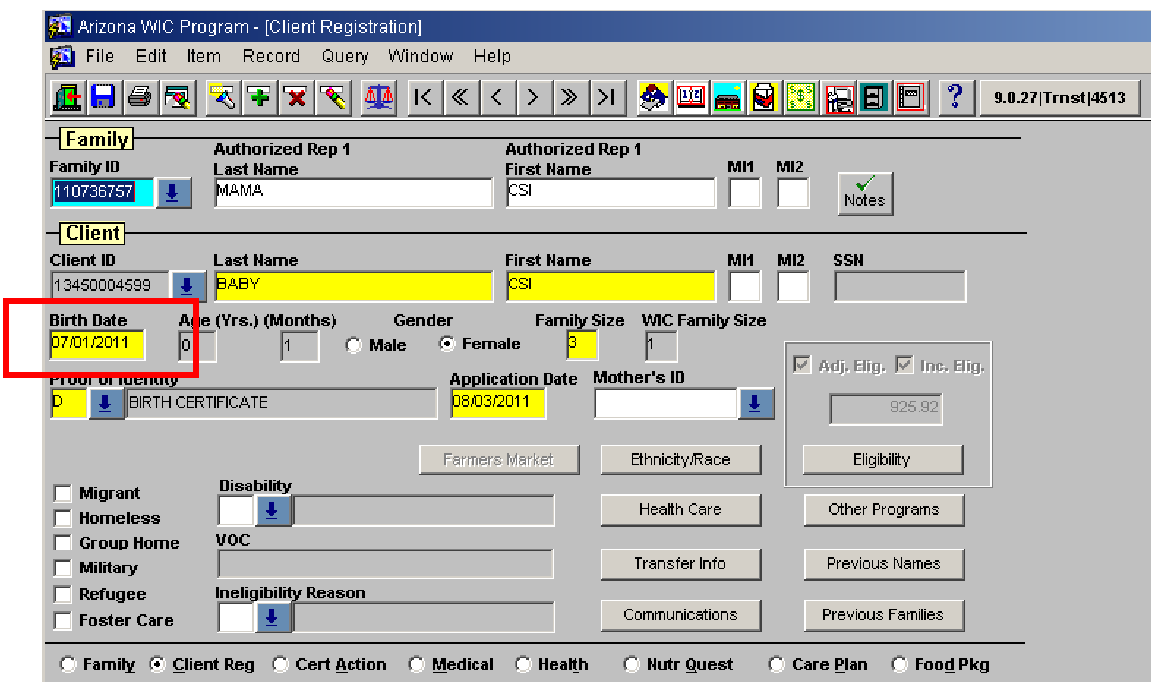


Figure 4 – Birth Date

2. Navigate to the FI lookup and obtain the date when the infant/child last received checks.

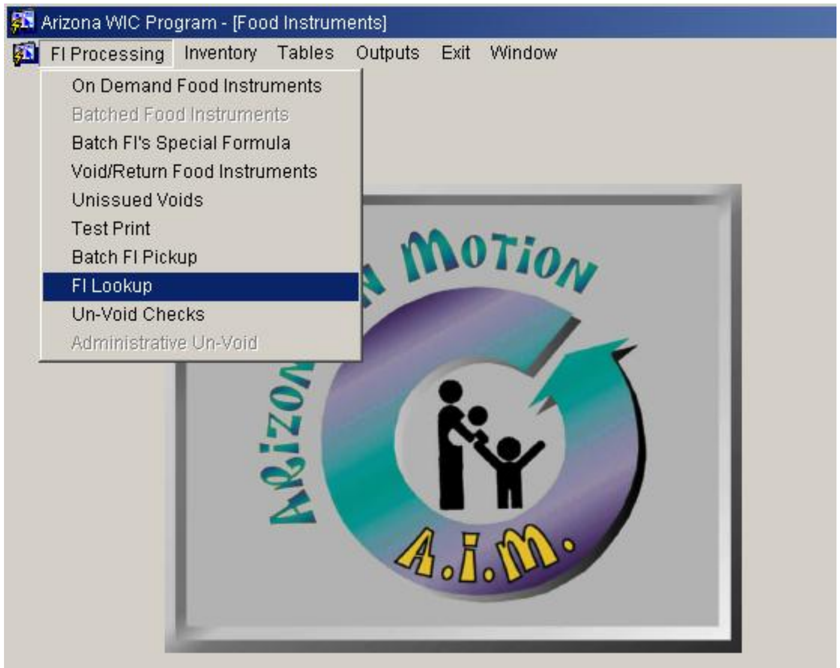


Figure 5 – FI Lookup

3. Calculate the age of the infant/child when they last received checks.
4. Compare that age from the current age of the client.
5. The answer to Question 3 is within the range of that answer.
    a. Example: If the current age of the infant is 9 months and the calculated answer is 7 months, then the answer to Question 3 can be anywhere between 7 and 9 months.

Breastfeeding Surveillance error message for question 5 “Breastfeeding duration cannot be greater than the age of the infant”

What could be happening?

When this error comes up, it is usually because the information entered does not match information that was entered in other areas of the Health History.

If you think this has happened, you could try…

To “trick” AIM into letting you exit the screen and re-enter the information.

Steps to take:

1. Log out of AIM/Citrix by double clicking on the Citrix icon in the lower toolbar.
2. Click on the Logoff button on the right side of the screen and click Yes to the “Are you sure you want to logoff xxxxxxxxxx?” message.

Special Note: This process may need to be repeated due to the text box being open in the Breastfeeding Surveillance screen.

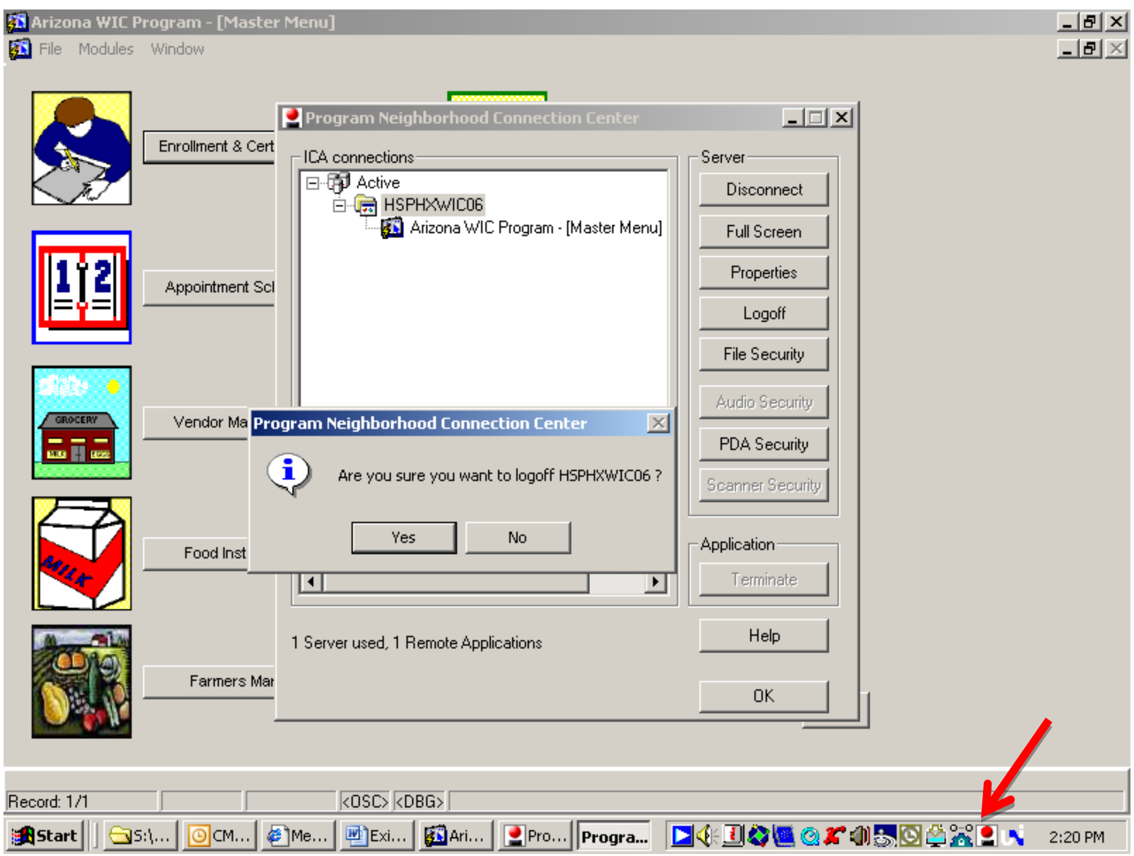


Figure 6 – Citrix Logoff

3. Log back into AIM.
4. Return to the infant’s Health History screen.

5. Find the question: “How is this baby fed?” and click “Details.”

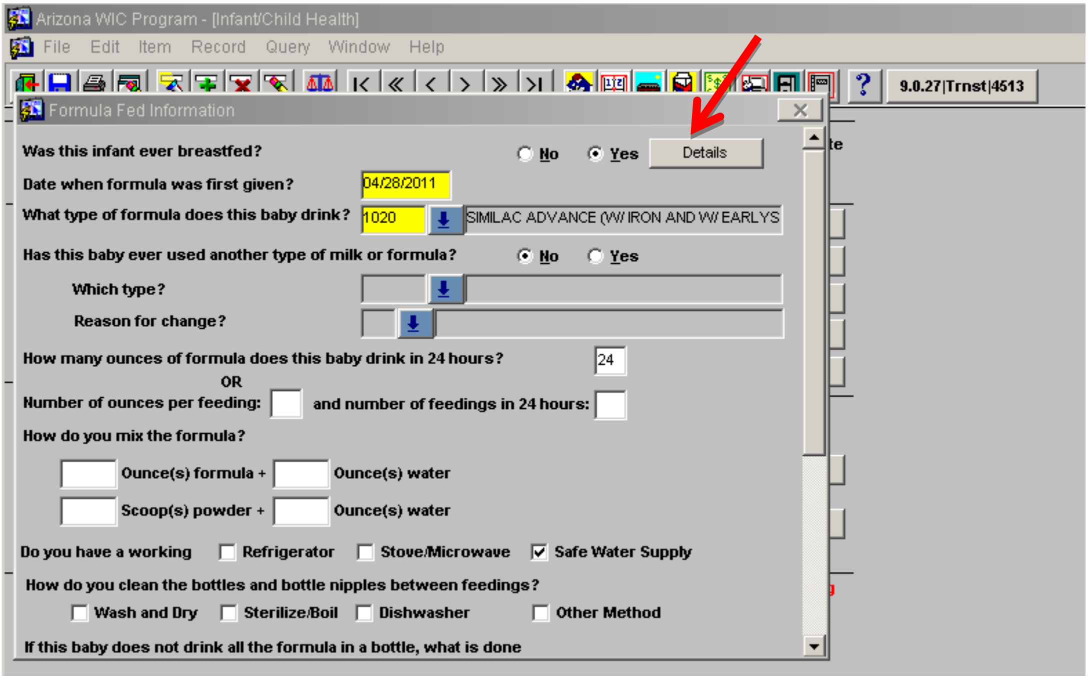


Figure 7 – Details on How is this Baby Fed?

6. Find the question: “Was this infant ever breastfed?”
7. Click No and then click the Save (disk) icon, then immediately change the answer back to Yes.
8. After you have completed steps 1-7, you should be able to enter the correct information on the Breastfeeding Surveillance screen.

To prevent this error in the future you could….

Make sure that the information for other breastfeeding questions is correct before entering it into the system, especially for question number 3 “How old was this infant/child when he/she completely stopped breastfeeding?”

Message in the On Demand screen stating: "Client xxxxxxxxxxx Forgot Income Documentation and Received One Month of Food Instruments. This Participant Is Not Eligible To Receive Food Instruments Until An Income Record Is Entered And Documented."

What could be happening?

This message usually pops up if the participant forgot their income documentation for a certification the previous month and you attempt to issue another month of Food Instruments without updating the income.

If you think this has happened, you could try…

To return to the Eligibility screen and update the family's/client's income.

Special Note: It is important that you review each Primary Provider listed in the Eligibility screen and update the record with the appropriate income provided. Otherwise, the message will continue to display until all forgot documentation codes have been updated in the record.

Message in the On Demand screen stating: "Error retrieving number of Food Instruments."

What could be happening?

This message usually pops up if the participant's food package dates do not cover the entire certification period.

If you think this has happened, you could try…

To correct the food package dates.

Steps to take:

Finding where the error occurred (if trying to issue to multiple clients):

1. Uncheck the FI issuance flag for each client.
2. Check the boxes again, one at a time, until the error pops up to identify which record has the issue.

Fixing the dates:

1. Once you have found the record that is causing the error, go to that client's Food Package Screen.
2. Re-enter the Effective and End dates for the food package(s) and save.
3. Continue on to On Demand and print the family's Food Instruments.

MISCELLANEOUS AIM SYSTEM MESSAGES

"Unable to reserve record" message

What could be happening?

This can be caused by more than one person trying to access a client's record at the same time or exiting out of AIM/Citrix by using Ctrl-Alt-Delete.

You could try…

a. Making sure you are the only person trying to access the client record.
b. If the error message continues to pop up, you can give CMA a list of the AIM user names who have been in the record that day and CMA will terminate each of the sessions.

"You are running in query only mode" message

What could be happening?

You could be logged into clinic 00.

You could try…

Logging off of and then log back into AIM under a specific clinic.

"Record must be entered or deleted first" message

What could be happening?

You could be clicking the Add Record (**Green +**) icon when the cursor is in a blank field.

You could try…

a. To add data into the existing field.
b. If adding data does not resolve the situation, contact the Help Desk.

"Field is protected against update" message

What is happening?

This means that the data in the field you are trying to delete or change cannot be changed. This message typically displays the day after data was entered and saved in a client record.

"The credentials you have supplied are invalid" message (Citrix)

What is happening?

This means that the data you have entered doesn't match your user name and password in the Citrix system.

You could try…

a. Making sure the Caps Lock is turned off.
b. If you are using the numbered keypad, make sure the Num Lock feature is turned on.

"Invalid username or password" message (AIM)

What is happening?

This means that the data you have entered doesn't match your user name and password in the AIM system.

You could try…

a. Making sure the Caps Lock is turned off.

b. If you are using the numbered keypad, make sure the Num Lock feature is turned on.

c. If these steps do not work, have your supervisor reset the password for you.

"Primary Key violation: AIM_PK_violated…"

What is happening?

AIM is having trouble saving data to the database, please contact the Help Desk.

Section 2: Troubleshooting & Resolutions

Section Concepts:

This section covers common issues that have been reported to the Help Desk and how to avoid or resolve them.

CLIENT REG SCREEN

Client is showing as over income when they are within the income guidelines

What could be happening?

When this Issue comes up it is often caused by having multiple income providers in the Income Family screen. Some of the information listed under these providers may not be accurate or up to date.

If you think this is happening, you could try…

To delete any incorrect or old income information (providers cannot be deleted, only the income information).

Steps to take:

Deleting Inaccurate or Outdated Over Income Data:

1. Navigate to the Client Reg screen and click on Eligibility.
2. Click on Income Family or Income Individual, as applicable.
3. Click on each of the lines for the secondary providers in the Income window.
4. Click on the Interval of the income you would like to delete.
5. Click on the **Red X** in the AIM toolbar to remove the income.
6. Click the Save (disk) icon.
7. Client should now be eligible for the program.

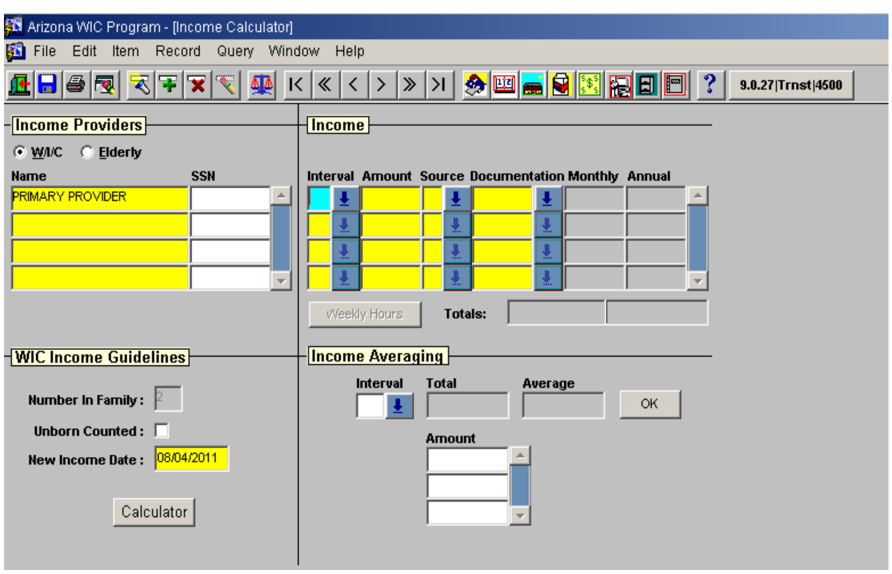


Figure 8 – Income Interval

Wrong Date of Birth or Category (on day of certification only)

What's wrong?

The infant or child has an incorrect birth date or category.

If you think this has happened, you could try…

Correcting the date of birth or category.

Special Note: These issues can only be corrected on the day of certification.

Steps to take:

For Infants with an incorrect date of birth:

1. Change the Birth Date in the Client Reg screen and click the Save (disk) icon.
2. You will be prompted to go to Cert Action screen to correct the Expected Delivery Date (EDD).
3. After you have corrected the EDD, tab through all of the fields on the page to correct the Cert End Date.
4. If medical data has been entered, tab through the fields on the Medical screen to correct the data on the growth charts.

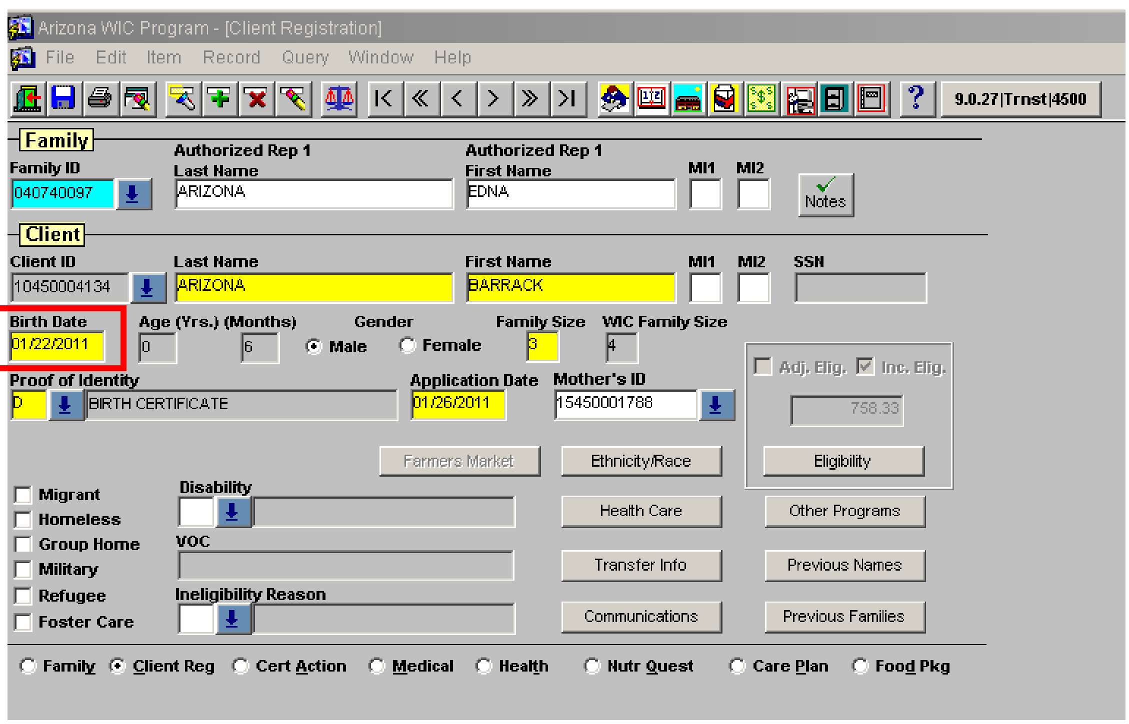


Figure 9 – Birth Date

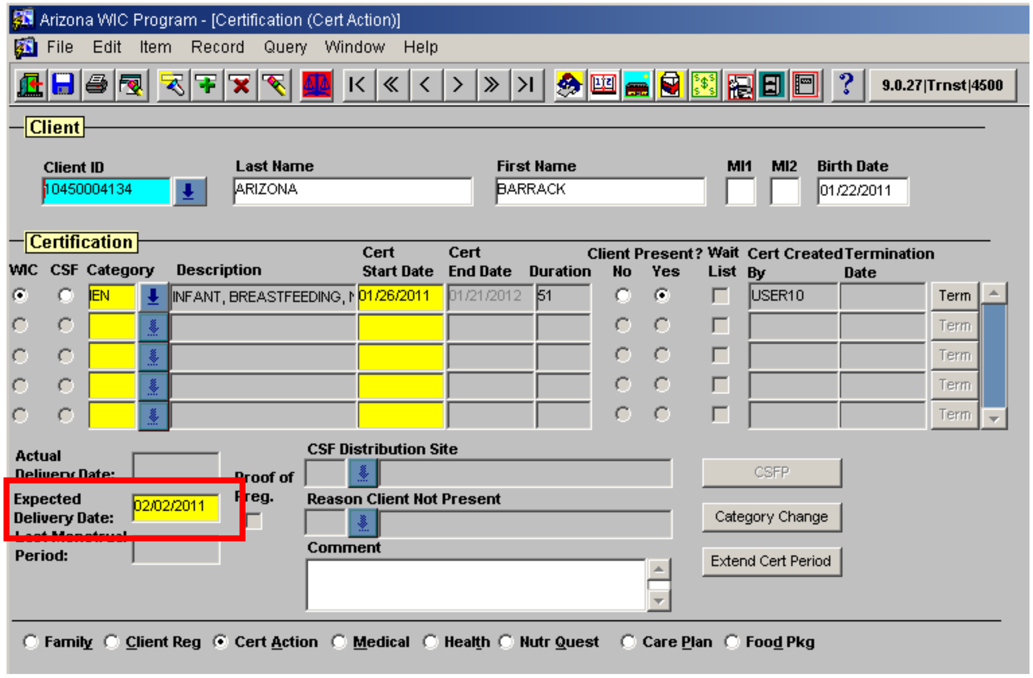


Figure 10 – Expected Delivery Date

For Infants with an incorrect category:

1. Click in the Category field In the Cert Action screen and use the backspace key to remove the incorrect category.
2. Type in the correct category.
3. Tab through the fields and click the Save (disk) icon.
4. Update Health History data if necessary.

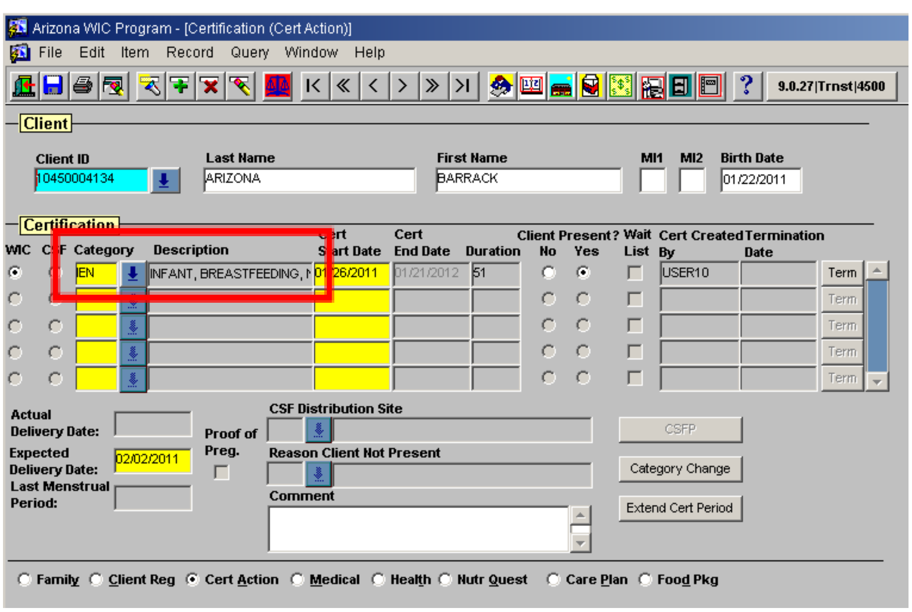


Figure 11 – Category

For Categories C1-C4 with an incorrect birth date:

1. Terminate the new certification on the Cert Action Screen.
2. Change the Birth Date on the Client Reg screen and click save.
3. Return to the Cert Action screen and un-terminate the certification by clicking in the code field and then clicking the **Red X**, then OK to exit the screen.
4. Click the Save (disk) icon.

Special Note: Sometimes a change in Birth Date causes a change in the category, if this happens; you can correct the category (see below).

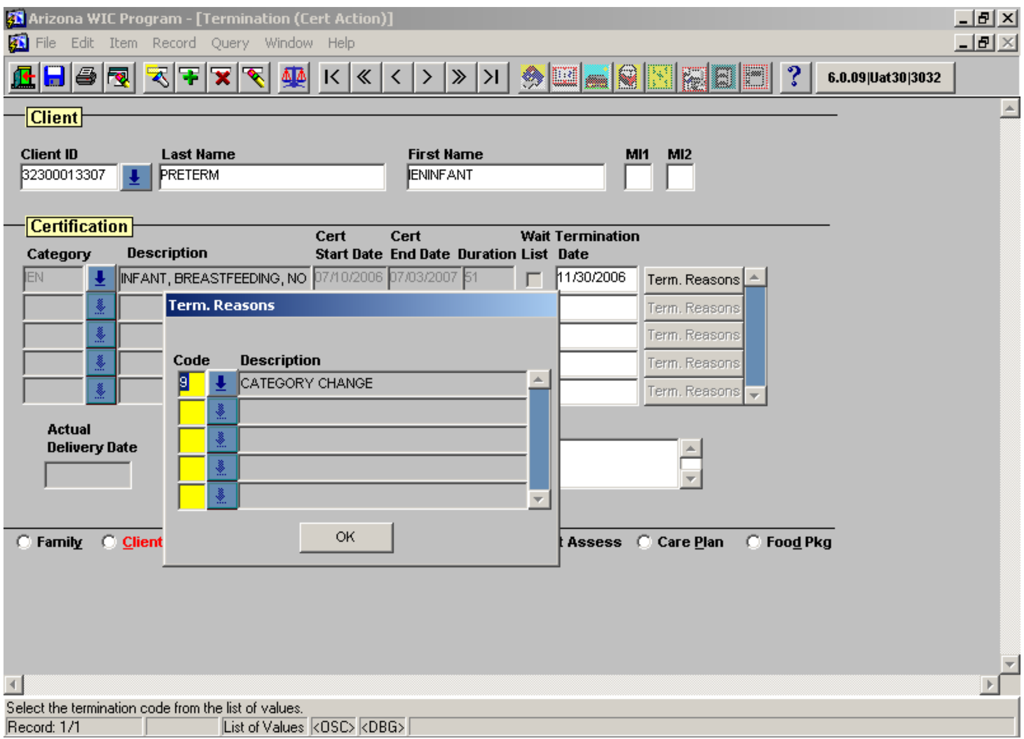


Figure 12 – Termination

For Categories C1-C4 with an incorrect category

1. Click the Cert Action screen radio button, and click in the Category field.
2. Back space to remove the incorrect category and type in the new category
3. Tab through the fields and save.
4. If Medical and Health data has been entered, tab through the medical data fields to correct graph plotting and review Health data for possible corrections.

CERT ACTION AND TERMINATION SCREENS

Accidental Termination of Certification

What's wrong?

The client was terminated by accident.

If you think this has happened, you could try…

Deleting the termination.

Steps to take:

1. Exit the client record.
2. At the main Enrollment and Certification page, select (from the drop down menu) Certification, then Cert Action and finally Termination.
3. Pull up the client's record in the Termination screen.
4. Click the Term Reasons button and click on the **Red X** in the toolbar.
5. Click the Save (disk) icon.

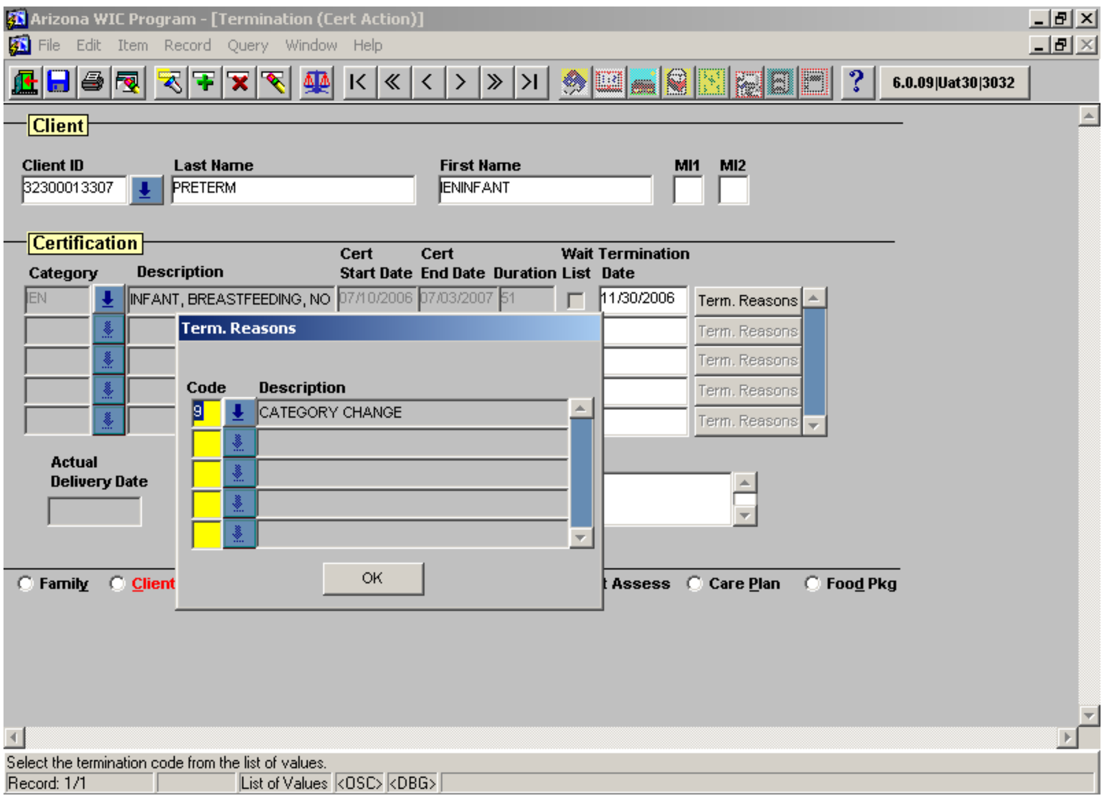


Figure 13 – Termination Reasons

TRANSFER SCREEN

Out-of-State Transfer – misunderstanding other state's WIC categories

What could be happening?

You accidentally categorized the certification for an out-of-state transfer as postpartum (P), instead of pregnant (PG/PG2) during the initial transfer. This often happens when states use different category codes. For example, P in other states may mean pregnant, while in Arizona it means postpartum. This causes a problem when the client returns to be recertified as a postpartum (P). The category won't be accepted by the system because the same Actual Delivery Date (ADD) cannot be listed for two separate postpartum certifications.

If you think this has happened, you could try…

Fixing the category (same day only) or calling the Help Desk.

Steps to take:

a. If you notice this error on the same day as the initial transfer, you can reselect the category on the Cert Action. screen and tab through the certification fields to recalculate the End Date.

b. If you notice this at a future visit, you will need to contact the AIM helpdesk for assistance.

To prevent this error in the future you could….

Verify the participant's category before assigning it in AIM.

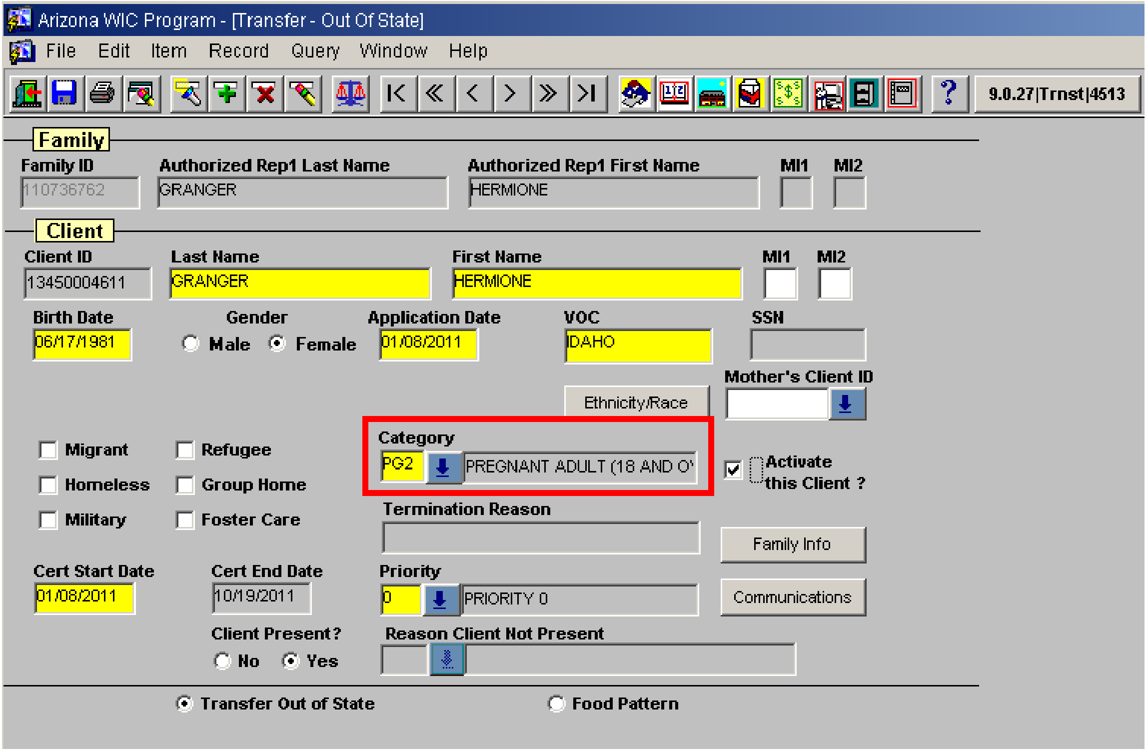


Figure 14 – Category

Reinstatement of out-of-state transfers

What's happening?

A family moved out of state while on the Arizona WIC Program and has moved back and needs to return to Arizona WIC.

What can you do?

In most cases, you can reinstate the previous client/family records if the following conditions are present:

1. The record is inactive.
2. An Ineligibility Reason exists.
3. The Application Date is a date in the past.

Steps to take:

Deleting the Ineligibility Reason allows you to move an Out-of-State Transfer back into the existing family record.

1. Start in the Client Reg screen.
2. Click on the Ineligibility Reason drop down arrow on the Client Reg screen and this message will pop up:

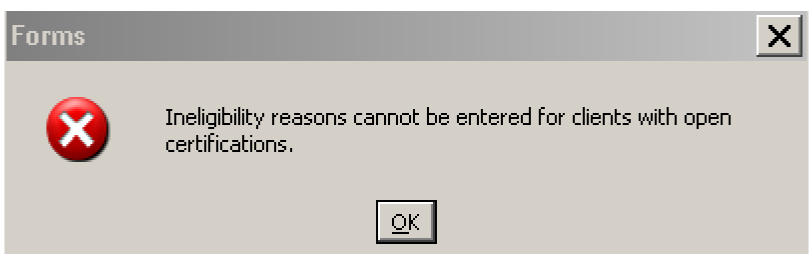


Figure 15 – Warning Pop-up

3. Click OK.
   a. Clicking OK to the message deletes the Ineligibility Reason from the field.
4. Click the Save (disk)icon.
5. Complete the Ineligibility Reason removal process for each member of the family that will be transferred back into AIM.

Special Note: The Ineligibility Reason must be pre-existing. Out of State Transfer cannot be completed if a client record is terminated and the Ineligibility Reason is removed on the same day.

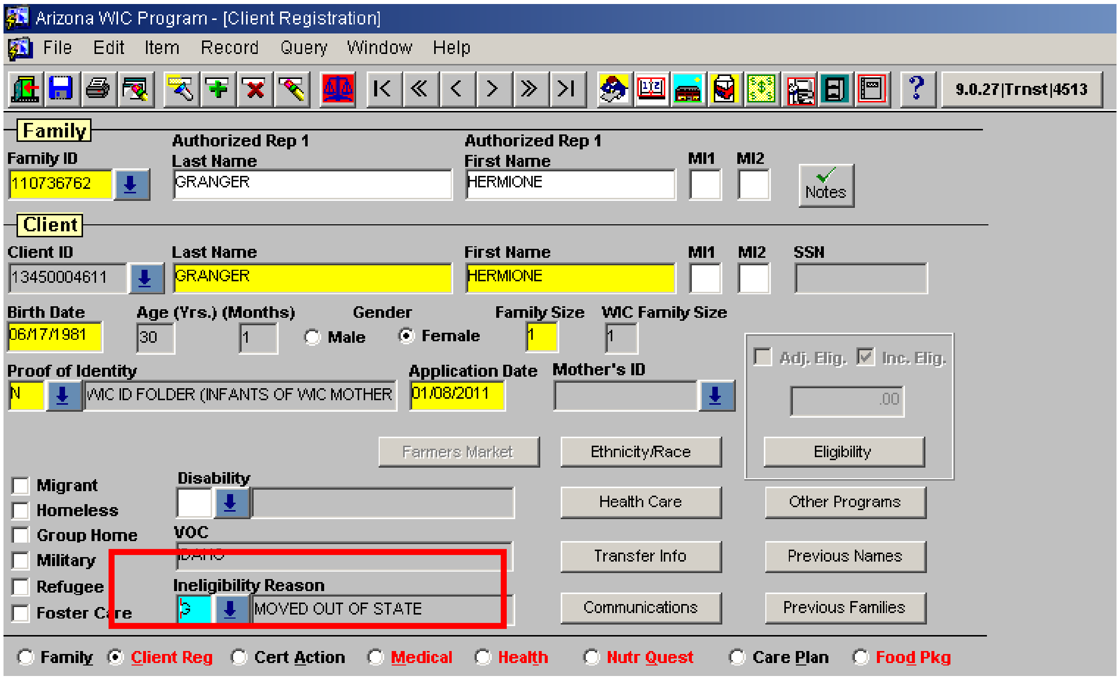


Figure 16 – Ineligibility Reason

6. Proceed to the Out-of-State Transfer screen.
7. Click the Query (flashlight) icon and enter the Family ID.
8. Click the Query (flashlight) icon again to bring up the family.
9. Click the Client Info push button to bring up the information about the first client in the family.

Special Note: For child categories (C1 – C5), you must change the application date to the current date. Women and infant categories do not require change of application date.

10. Enter the Verification Of Certification (VOC) data.
11. Select the category that corresponds to the VOC data.
12. Enter the Cert Start Date from the VOC data.
13. Enter the Priority (Zero for transfers).
14. Click either Yes or No to Client Present?
15. Save and click OK to the Transaction complete message.
16. Click the Next Record (VCR button) to retrieve the next member of the family to be transferred, and repeat the steps above.

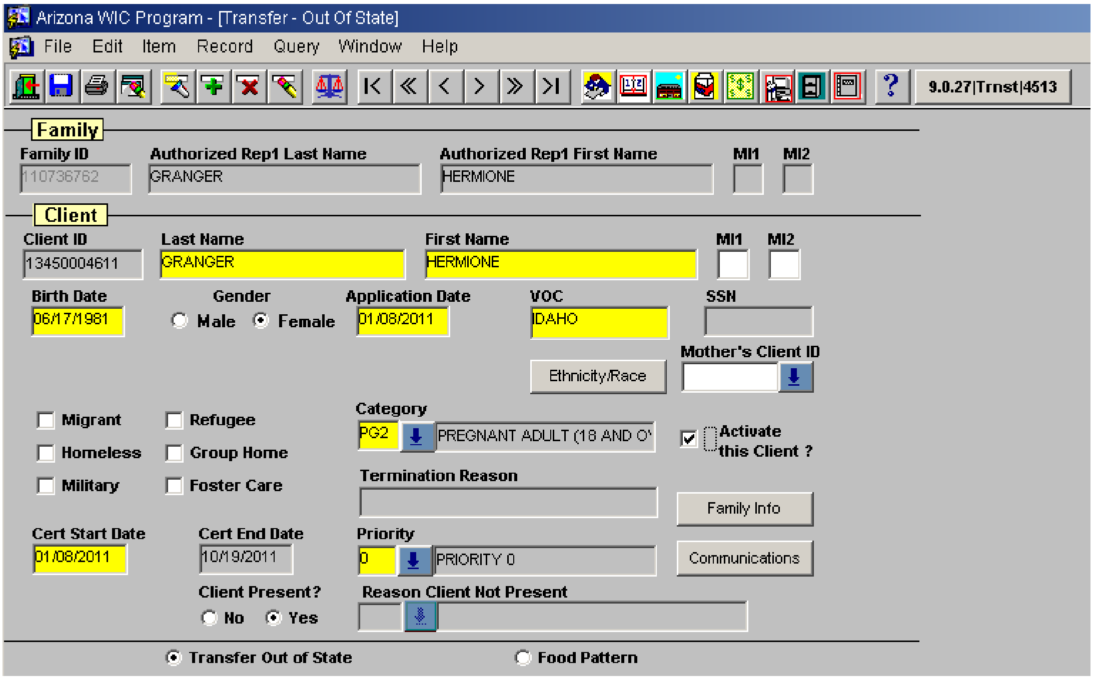


Figure 17 – Transfer Screen

17. After completing transfers for current family members, click the Insert Record (**Green +**) to add any new additions to the family.

Special Note: Make sure you wait until the end to add any new family members.

18. Select the Food Pattern radio button at the bottom of the window to assign food packages and print Food Instruments.

Special Note: If a family returns to your Arizona WIC after being on another state WIC program and the certification is still active, then continue with the existing certification. You may need to un-terminate the record if the record was manually terminated when the family moved out of Arizona.

ON DEMAND/UNIPRINT – ISSUES

There is no checkmark next to client's name on the On Demand screen

Things you could try:

1. Go to the Cert Action, Medical, Health and Food Package screens and click the Save icon (disk) in each screen.
2. If this does not work, make sure the client is in a valid certification, and has a valid food package assigned.
3. Review last Food Instrument issuance.

Blank checks are in the preview window or checks are printing from the old food package

What could be happening?

If the Food Instruments are blank in the preview or they printed from the old food package, the client may have two open certifications. This can happen if the current certification was not terminated when the new certification (category change) was completed in the Cert Action screen, for example:

- A category change is done and a new food package is selected. When the Food Instruments are previewed they are blank. However, there were no messages to indicate that there was an error in the process.
- A category change is done and a new food package is selected. Food Instruments are printed and the amount and/or type of formula is incorrect. There were no messages to indicate that there was an error in the process.

If you think this has happened, you could try…

Terminating the old certification.

Steps to take:

1. At the main Enrollment and Certification page, select (from the drop down menu) Certification, then Cert Action and finally Termination.
2. When the screen opens enter the Client ID.
3. Click on the Query (flashlight) icon.
4. Select the oldest certification that has no termination date and click in the Termination Date field (it will auto fill with the current date).
5. Click on the Term Reasons push button.
6. When the screen opens click on the drop down arrow for the list of Termination Reason, select the appropriate Termination Reason and click OK.

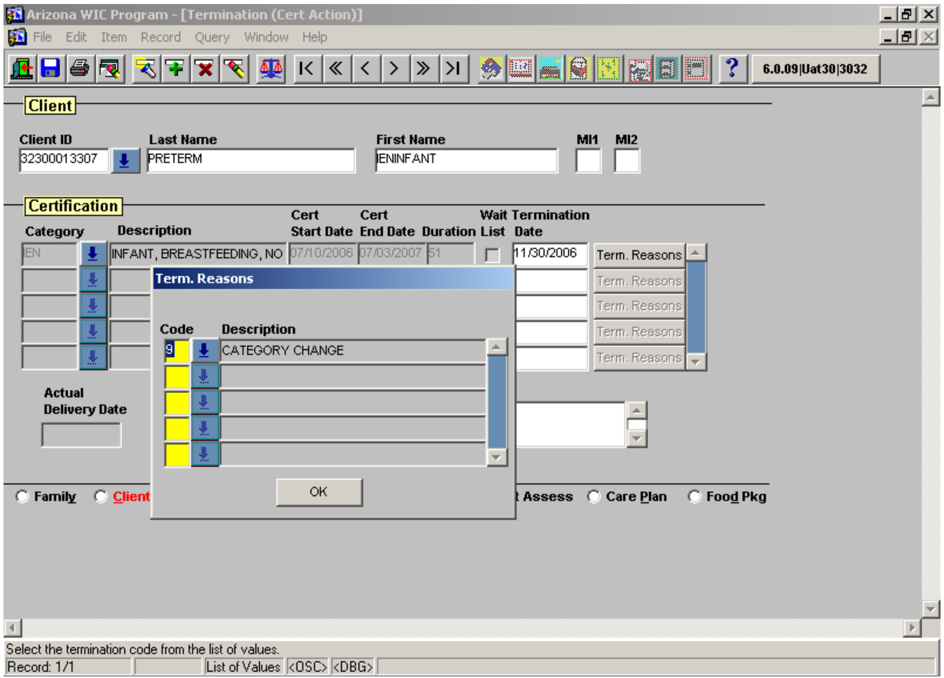


Figure 18 – Termination

7. Click OK again to close the screen.
8. Click on the Save (disk) icon.
9. Click on the appropriate radio button at the bottom of the screen to return to the client record.

All of the checks do not print or UniPrint spooling does not come up

What could be happening?

UniPrint may not have loaded properly.

If you think this has happened, you could try…

To launch UniPrint.

Steps to take:

1. Click on the Start icon in the taskbar.
2. Click on All Programs.
3. Scroll to locate the UniPrint Client program.
4. Click on UniPrint Client.
5. Click on Launch UniPrint Client to load the program.
6. If problems persist, call the Help Desk.

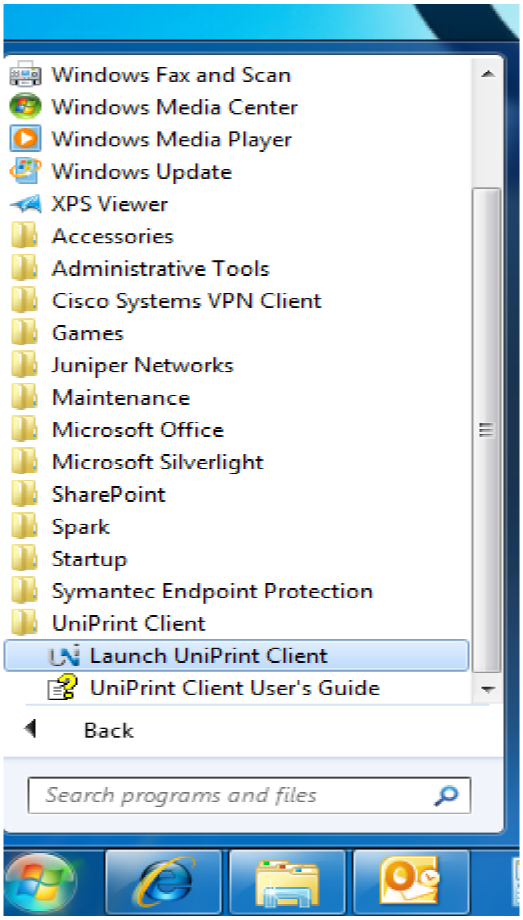


Figure 19 – UniPrint on Start Menu

When sending a print job through AIM, the system asks for User Name, Password and Domain

What happened?

The network connection has been lost.

You could try…

To restart your computer and then send the print job again.

Section 3: Transfers

Section Concepts:

This section will cover Out-of-State transfers, reinstatement of Out-of-State transfers, creating a placeholder family and transferring just one client.

Step-by-Step Instructions:

TRANSFER OUT-OF-STATE

When doing out-of-state transfers it is important to follow each step in order to avoid any issues with AIM. The Transfer-Out-of-State window is completed by the receiving clinic when a participant comes into a clinic stating they are currently certified on WIC in another state. You would also use this window to complete a transfer for participants enrolled within the state of Arizona on the Navajo Nation or ITCA WIC program. All AIM Consortium Partners must use this screen as well if transferring amongst the State Agencies within the Consortium. The participant should have basic certification/transfer information with them.

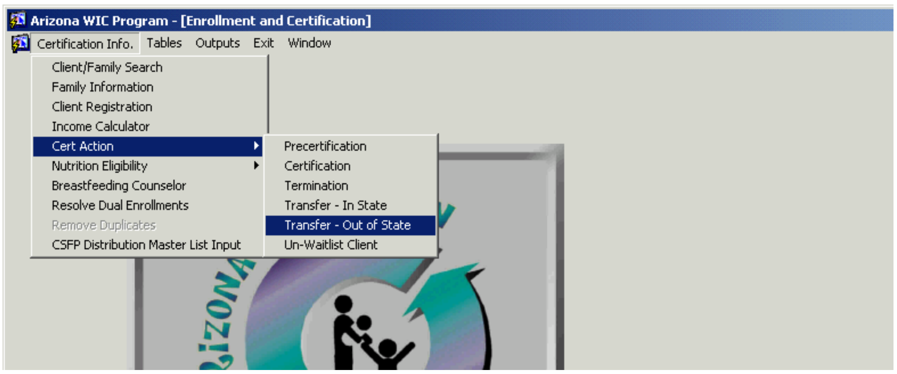


Figure 20 - Transfer Out of State Navigation

1. Click the Certification Info menu in the Enrollment and Certification main menu.
2. Click Cert Action.
3. Click Transfer Out-of State. You are now at the Transfer Out-of State window.

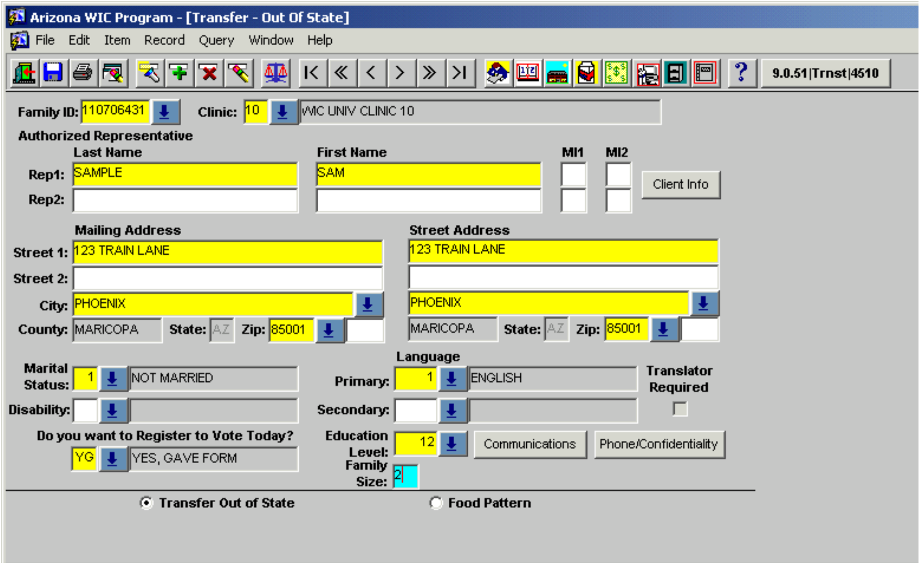


Figure 21 - Transfer Out-of-State screen

4. Click the Clinic LOV and select the clinic site. The system will generate a new Family ID.
5. Complete the required fields.
    - Authorized Rep name
    - Address
    - Marital Status
    - Voter Registration
    - Family Size
    - Primary Language
    - Education Level
6. Click on the appropriate push button to enter in the Communications and Phone/Confidentiality information as needed.
7. Click on the Client Info push button. This pop-up is similar to the Client Registration window. The Family section is carried over from the previous screen.

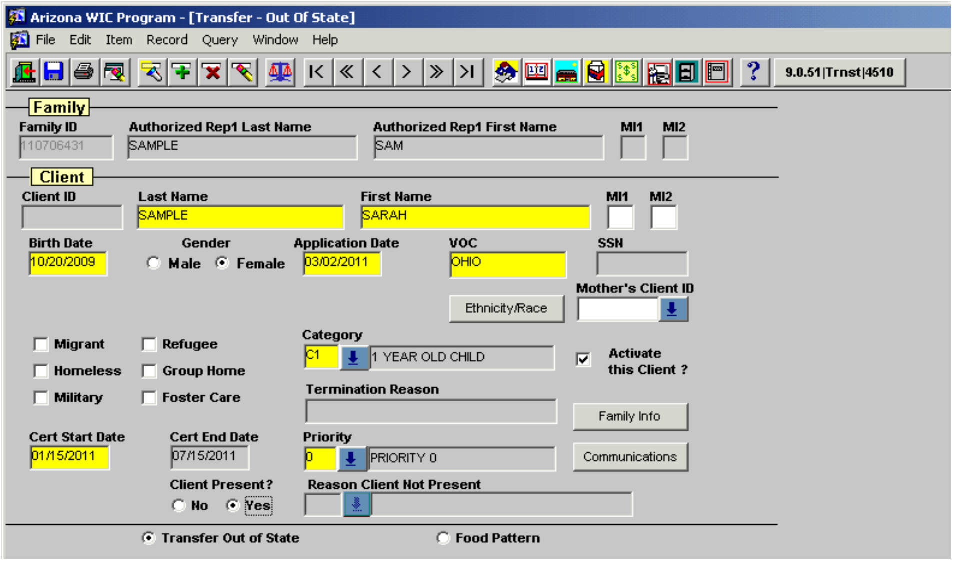


Figure 22 - Client Info. (Transfer Out-of-State)

- Fill in the required participant information:
  - ➢ Client Name
  - ➢ Birth Date
  - ➢ Application Date
  - ➢ VOC
  - •(VOC # from previous WIC Program) A value MUST be entered in this field to complete a transfer. Please refer to your state policy for acceptable values if a VOC number is not available
  - ➢ Ethnicity/Race
  - ➢ Category
  - ➢ Cert Start Date
  - •The Cert End Date will auto calculate based on category once the cert start date is entered
  - ➢ Priority
  - ➢ Client Present

8. The Activate the Client? check box will default as marked to indicate the client is active. Do not remove the check to make the participant inactive.
9. Click on the Family Info push button to return to the Transfer Out-of State window.
10. Save. You have completed the transfer process.
11. Checks may be printed at this time by selecting the Food Pattern radio button at the bottom of the window. Please refer to the AIM 101 training manual to review completion of the Food Package window.
12. Exit to the Enrollment and Certification window.

TO REINSTATE AIM FAMILY RECORDS UPON AN OUT OF STATE TRANSFER:

From time to time, families that moved out of state while on WIC in your state end up moving back to your state and need to return to WIC. In most cases, you may be able to reinstate the previous client/family records if the following conditions are present:

In most cases, you can reinstate the previous client/family records if the following conditions are present:

1. The record is inactive.
2. An Ineligibility Reason exists.
3. The Application Date is a date in the past.

Step-by-Step Instructions:

Deleting the Ineligibility Reason allows you to move an Out-of-State Transfer back into the existing family record.

1. Start in the Client Reg screen.
2. Click on the Ineligibility Reason drop down arrow on the Client Reg screen and this message will pop up:

Figure 23 – Warning Pop-up

3. Click OK.
   a. Clicking OK to the message deletes the Ineligibility Reason from the field.
4. Click the Save (disk)icon.
5. Complete the Ineligibility Reason removal process for each member of the family that will be transferred back into AIM.

Special Note: The Ineligibility Reason must be pre-existing. Out of State Transfer cannot be completed if a client record is terminated and the Ineligibility Reason is removed on the same day.

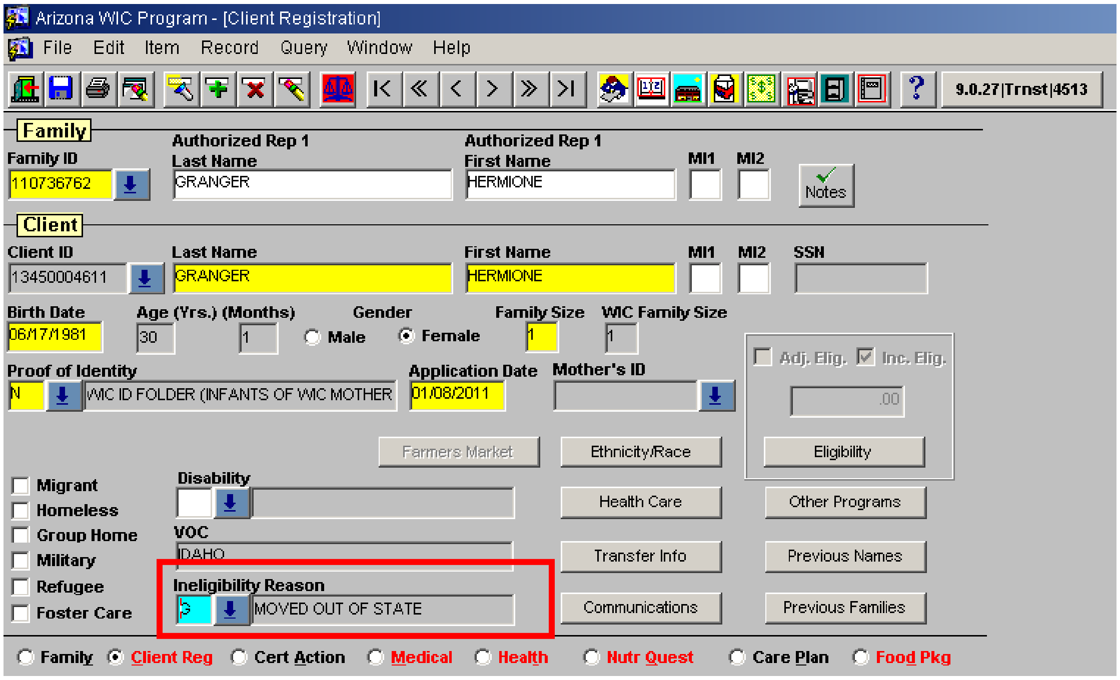


Figure 24 – Ineligibility Reason

6. Proceed to the Out-of-State Transfer screen.
7. Click the Query (flashlight) icon and enter the Family ID.
8. Click the Query (flashlight) icon again to bring up the family.
9. Click the Client Info push button to bring up the information about the first client in the family.

Special Note: For child categories (C1 – C5), you must change the application date to the current date. Women and infant categories do not require change of application date.

10. Enter the Verification Of Certification (VOC) data.
11. Select the category that corresponds to the VOC data.
12. Enter the Cert Start Date from the VOC data.
13. Enter the Priority (Zero for transfers).
14. Click either Yes or No to Client Present?
15. Save and click OK to the Transaction complete message.
16. Click the Next Record (VCR button) to retrieve the next member of the family to be transferred, and repeat the steps above.

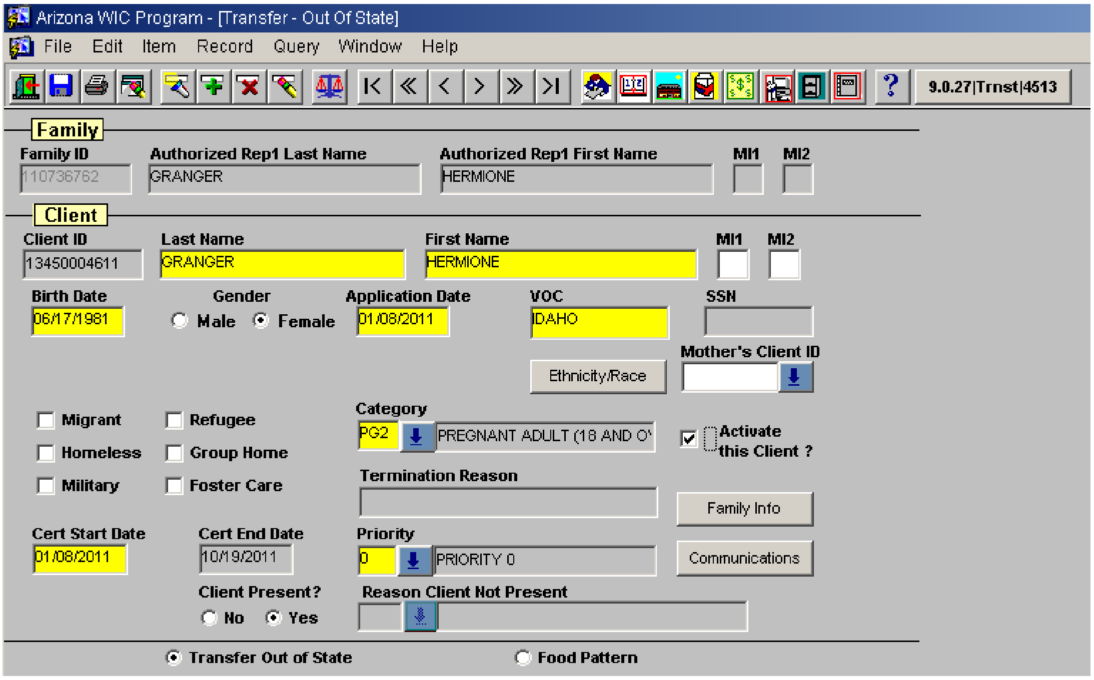


Figure 25 – Transfer Screen

17. After completing transfers for current family members, click the Insert Record (**Green +**) to add any new additions to the family.

Special Note: Make sure you wait until the end to add any new family members.

18. Select the Food Pattern radio button at the bottom of the window to assign food packages and print Food Instruments.

Special Note: If a family returns to your Arizona WIC after being on another state WIC program and the certification is still active, then continue with the existing certification. You may need to un-terminate the record if the record was manually terminated when the family moved out of Arizona.

MOVING A PARTICIPANT FROM ONE FAMILY TO ANOTHER

There are times when a family has two different Family ID numbers and you want to combine them into one family ID or a family member is moving from one Arizona WIC family to another Arizona WIC family.

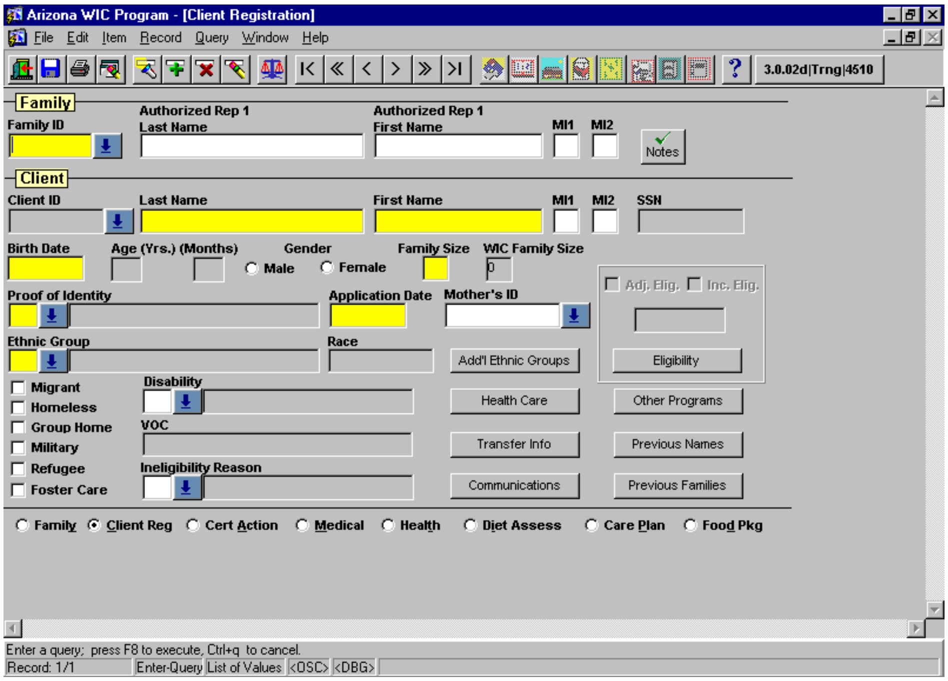


Figure 26 – Client Reg Screen

1. From the Client / Family Lookup screen, search for the participant you want to move. Write down the Client ID number or click in the field and press Ctrl + C on your keyboard.
2. Clear the form (icon on the top menu bar) and query the family into which you are moving the client. Double click the Client ID, which will bring you to the Client Reg screen.
3. Place your cursor in the Client ID field and click the query (flashlight) icon. The client information fields will be cleared. The Authorized Rep fields should still show the family's Authorized Rep.
4. Enter the Client ID number of the participant you wish to move by either typing it in or pressing Ctrl + V on your keyboard.
5. Click the query icon again. The participant's information will now be displayed.
6. Verify that the family information at the top of the screen is correct.
7. Save your work. The participant is now moved into the new family.

Tips, Tricks, and Shortcuts:

When transferring from clinic to clinic within a local agency, you may also look up the family or participant by double click in the Family ID field to access the Client/Family Lookup window.

To add multiple family members in the Client Info window, place your cursor in the Last Name field and click on the Insert Record icon. The Participant section is now blank and ready for the user to enter in data for the new family member.

The Transfer Out-of-State screen cannot be used for updating client records. Once you have completed entering client data in Client Info and save, the record cannot be modified in this screen. To modify the data in the record, within the same day, you will have to use the Certification screens.

WIC Waiting List: If the receiving agency is not serving the priority of the participant(s) being transferred the participant will be placed at the top of the waiting list.

Chapter 2: Operations Management

Chapter Preview:

This chapter describes how to use the Operations Management module of the AIM System. Operations Management automates administrative tasks and reports associated with the State and Local Agencies, Outreach/Referral Organizations, and Programs.

Chapter Objectives:

Upon completion of this chapter you will be able to:

- Correctly add, delete, and update staff member data.
- Properly update organizational unit data.
- Accurately add, delete, and update outreach/referral organizations.

Section 1: Organizational Units

Section Concepts:

This window is used to capture and maintain information about organizational units (State Agency, Local Agency, Clinic) in each State Agency WIC Program as well as the program categories and Outreach/Referral organizations that are associated with each Local Agency and clinics. Additionally, this window is used as the first step to creating your calendar where you will assign an appointment interval to your existing clinic(s).

Step-by-Step Instructions:

Figure 27 - Organizational Units Navigation

1. Click the Operations Management icon on the Master Menu.
2. Click Operations Mgt. on the Operations Management main menu.
3. Click Organizational Units.

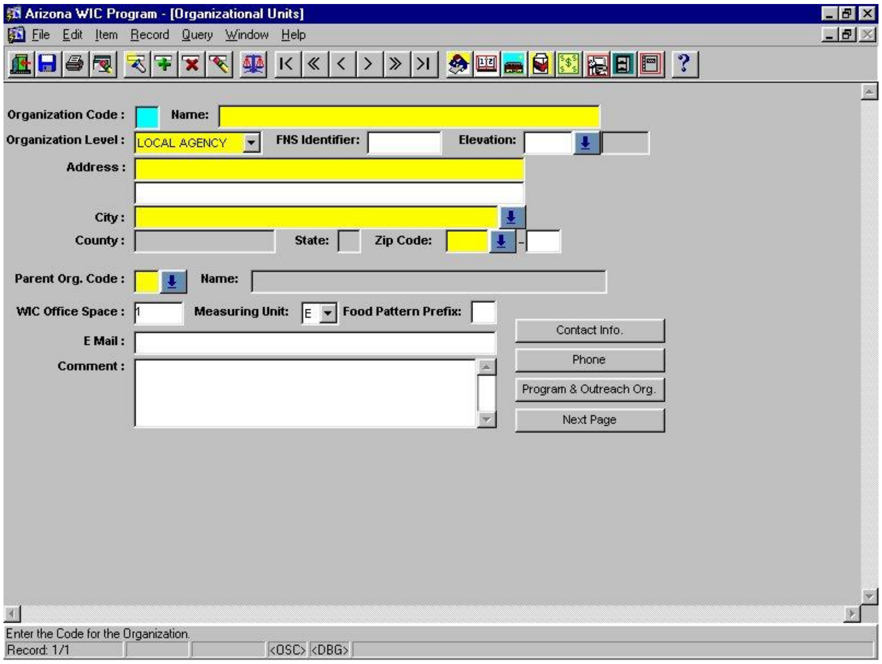


Figure 28 - Organizational Units

4. Type in the Organization Code determined by your State Agency.
5. Tab to the Name field and type in the organization's name.
6. Tab to the Organization Level field and select the type of organization from the drop down list.
   - The field defaults to Local Agency.
7. If applicable, Tab to the FNS Identifier field and type in the identification number assigned by Food and Nutrition Services (FNS).
8. Tab to the Elevation field and enter the elevation for the organizational unit.
   - The figure needs to be in feet above sea level.
   - This figure is used to help facilitate CDC reporting requirements for blood work data.
9. Tab to the Address field and enter the address for the organization.
10. Tab to the City field and type in the city or select it from the LOV.
    - The System defaults the County, State, and Zip Code fields based on the City.
11. Tab to the Parent Org. Code field and select the parent organization for this organization from the LOV.
    - This field is disabled if the Organization Level is State Agency.
    - If the Organization Level is Local Agency, the LOV contains the State Agency.
    - If the Organization Level is Clinic, the LOV contains all the Local Agencies.
    - The AIM System displays the Name field for the parent organization once the Parent Org. Code field is selected.
12. Tab to the WIC Office Space field and enter the office space, in square feet, that is allocated for the WIC Program at this specific site.

13. Tab to the Measuring Unit field and select the measurement unit (English or Metric) used at this location from the drop down list.
    - This field determines which measurement is defaulted for the weight and height fields on the Medical screen of the Enrollment and Certification module.
14. Tab to the E Mail field and type in the organization's e-mail address, if applicable.
15. Tab to the Comment field and enter any pertinent comments, if desired.
16. Click the Contact Info push button to display the Contact Info pop-up window.

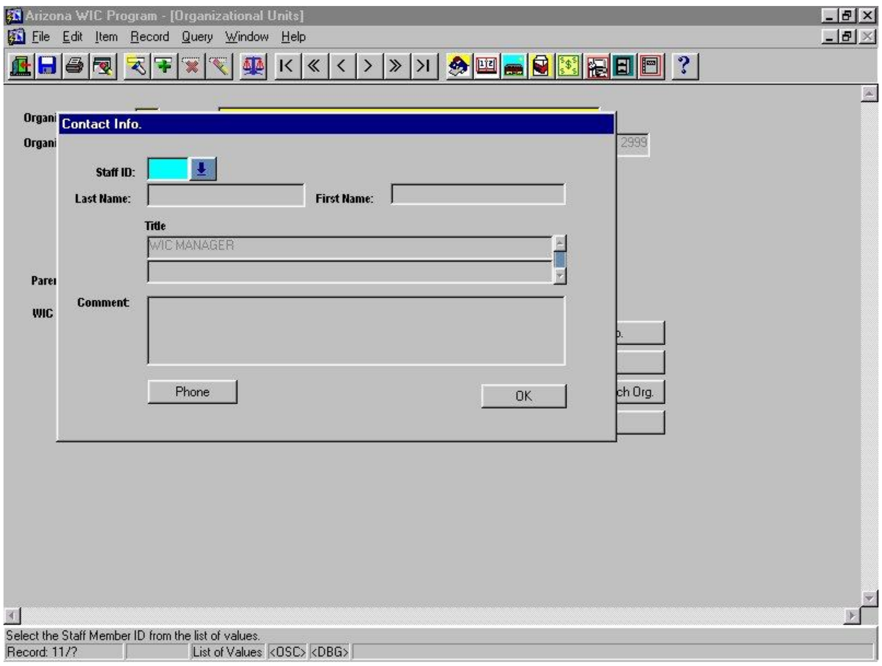


Figure 29 - Contact Info Pop-Up

17. Click the Staff ID LOV and select the identification number of the staff person who is designated as the contact for this organizational unit.
    - The AIM System displays the Last Name, First Name, Title, and Comment fields for the staff member once the Staff ID is selected.
    - Clicking the Phone push button allows you to view the phone information for this staff member. You may not update any phone information on this pop-up.

Special Note: If you do not remember the Staff ID number, you can look it up in the Operations Management module under Staff Data.

18. Click the OK button to save the data and return to the Organizational Units window.
19. Click the Phone push button to display the Phone pop-up window.
20. Enter the phone data for this organizational unit.

21. Click the OK button to save the data and return to the Organizational Units window.
22. Click the Program & Outreach Org. push button to display the Program & Outreach/ Referral Organizations pop-up window.

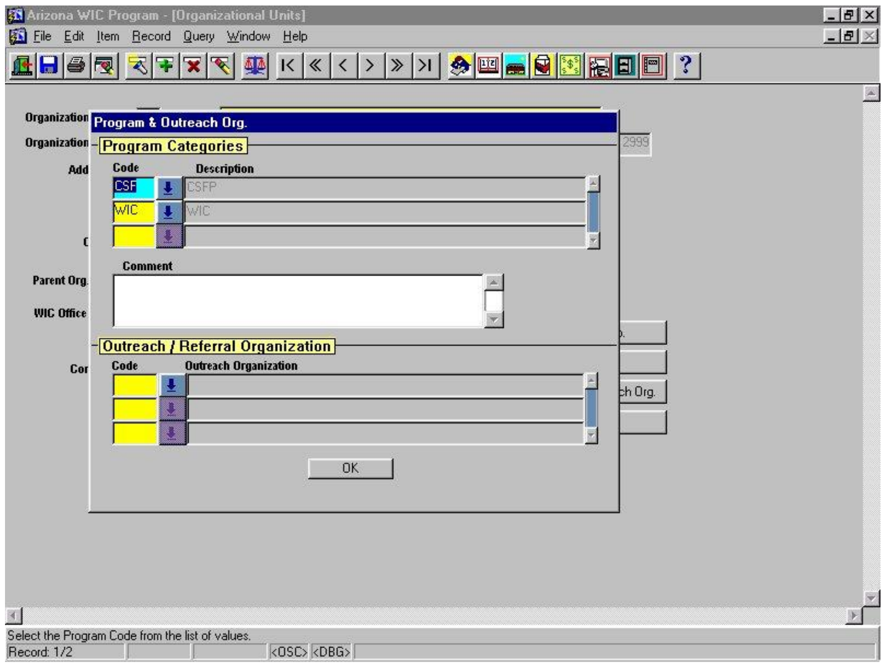


Figure 30 - Program & Outreach Referral Organizations Pop-Up

23. Click the Code LOV in the Program Categories section and select the program category identification code for which this organizational unit provides services.
    - The AIM System displays the Description field for the program once the Code field is selected.
24. Tab to the Comment field and enter any associated comments for this program, if needed.
    - Repeat Code selection and entering comments for all programs associated with this organizational unit
25. Click the Code field in the Outreach/Referral Organizations section.
    - Some of these fields may be already populated with Outreach/Referral Organizations affiliated with Programs entered in the Program Categories section.
26. To add an Outreach/Referral Organization not associated with the selected Programs, click the Insert Record icon . Click the Code LOV and select the Outreach/Referral Organization identification code.
    - The AIM System displays the name of the Outreach/Referral Organization in that field once the Code is selected.
27. Click the OK button to close the pop-up and return to the Organizational Units window.
28. Click the Next Page push button to display the Organizational Units Characteristics pop-up window.

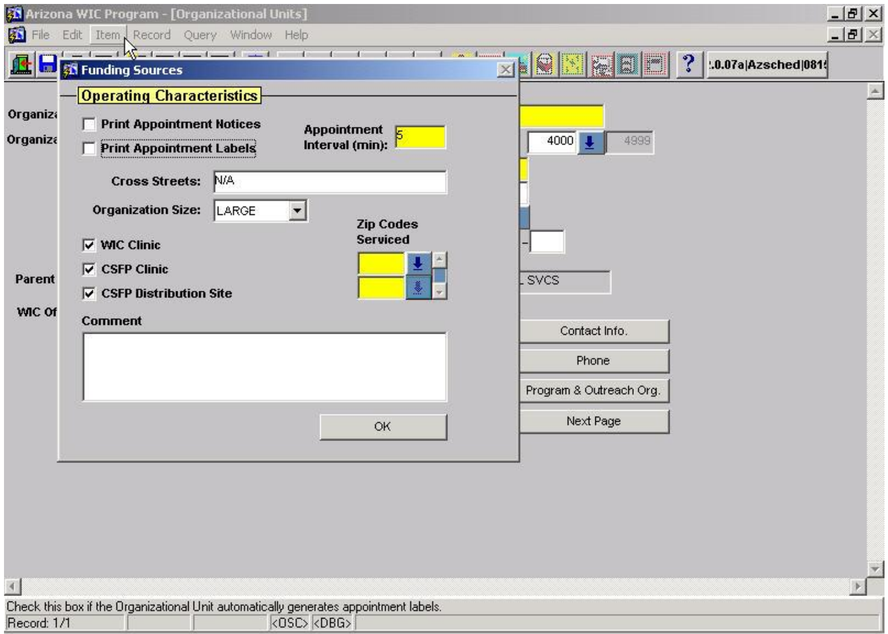


Figure 31 - Organizational Units Characteristics pop-up

29. The Print Appointment Notices checkbox defaults to checked. This allows for Appointment Notices to be printed as part of the End-of-Day process.
    - Uncheck the box to cancel the automatic generation of Appointment Notices.
30. The Print Appointment Labels checkbox defaults to checked. This allows for appointment address labels generated during the End-of-Day process.
    - Uncheck the box to cancel the automatic generation of address labels for appointments.
31. Tab to the Appt Interval field and enter the duration of time, in minutes, this is the time between appointment slots for the clinic.
    - Enter a duration interval of time that is suitable to the service that takes the least amount of time to complete, and will display a suitable number of appointment slots.

    Example: An FI issuance may only take 5 minutes to process, but if you assign your clinic interval duration at 5 minutes; there will be 96 appointment slots per user in an 8 hour work day. A 30 -minute appointment type will take up 6 appointment slots for one client.
32. Tab to the Cross Streets field and enter the main cross streets nearest this organizational unit, if desired.
    - This information can be particularly helpful to other clinics and agencies attempting to assist potential clients in locating your site.
33. Tab to the Organization Size and select the size of the organizational unit (small, medium, large) from the drop-down list.
    - This is used to determine clinic size for finance and food instrument functions in the AIM System.
34. Tab to the WIC Clinic checkbox and mark as checked if this organizational unit is designated as being a WIC clinic.

35. Tab to the CSFP Clinic checkbox and mark as checked if this organizational unit is designated as being a CSFP clinic.
36. Tab to the CSFP Distribution Site and mark as checked if this organizational unit is designated as being a CSFP Distribution Site.
    - These checkboxes are useful in other areas of the AIM System to allow a LOV window to only display WIC clinics, CSFP clinics, or CSFP Distribution sites, as appropriate, for user selection.
37. If desired, Tab to the Zip Codes Serviced field and select the zip code(s) for which this organizational unit provides services.
    - This is determined by your State Agency.
38. Tab to the Comment field and enter any associated comments for these Operating Characteristics, if needed.
39. Click the OK button to close the pop-up and return to the Organizational Units window.

Tips, Tricks, and Shortcuts:

To update an existing organizational unit's record:

1. Upon entering the Organizational Units window, put the window into Query format by pressing the F8 key or clicking the Query icon on the toolbar.
2. Enter the Organization Code and/or the Name of the Organization.
3. Execute the Query.
4. Update record as needed.
5. Click the Save icon on the toolbar to save updates.
6. Click the Exit icon on the toolbar to return to the Operations Management main menu.

Section 2: Outreach Programs & Referrals

Section Concepts:

This window is used to capture and maintain information about Outreach/Referral Organizations, and the Program Categories for which they provide services. Data about Outreach/Referral Organizations entered at a Local Agency is sent to the Central database as part of the End-of-Day process but each Local Agency database only contains the Outreach/Referral Organization information that pertains to its clinics.

Step-by-Step Instructions:

Figure 32 - Outreach/Referral Organizations Navigation

1. Click the Operations Management icon on the Master Menu.
2. Click Operations Mgt. on the Operations Management main menu.
3. Click Outreach Organizations.

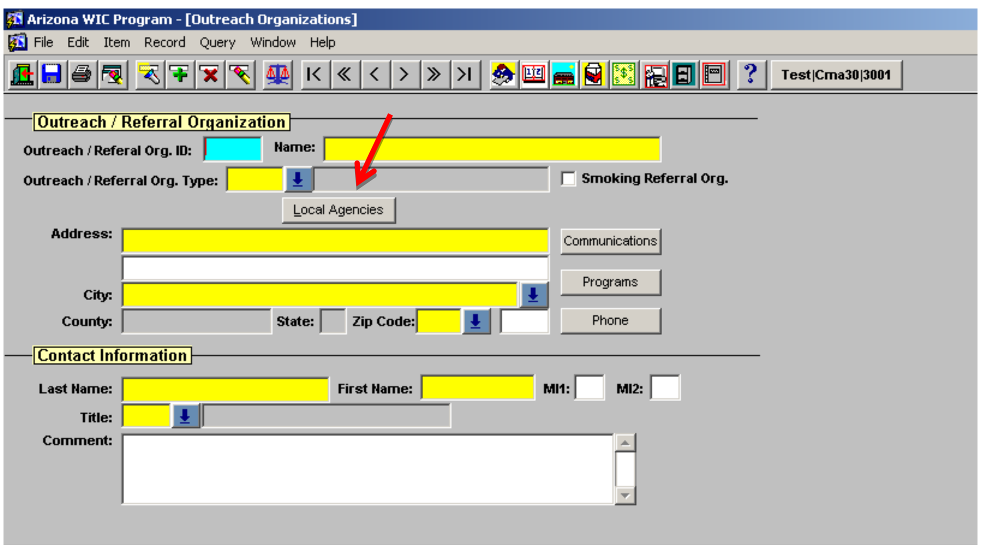


Figure 33 - Outreach/Referral Organizations

4. Tab off the Outreach/Referral Org. ID field, the AIM System automatically creates the ID number.

5. Type in the Name of the Outreach/Referral Organization.
6. Tab to the Outreach/Referral Org. Type field and select the type from the LOV.
7. Tab to the Address field and type in the address for this Outreach/Referral Organization.
8. Tab to the City field and type in the city or select it from the LOV.
   - The System defaults the County, State, and Zip Code fields based on the City.
9. Tab to the Contact Information section and type in the name of the contact for this Outreach/Referral Organization.
10. Tab to the Title field and select the contact person's title from the LOV.
11. Tab to the Comment field and enter any applicable comments, if needed.
12. Click the Communications push button to display the Communications pop-up window.
    - This is the same pop-up window as previously discussed in Enrollment and Certification. Refer to Chapter 6 for further information.
13. Click the Programs push button to display the Programs pop-up window.

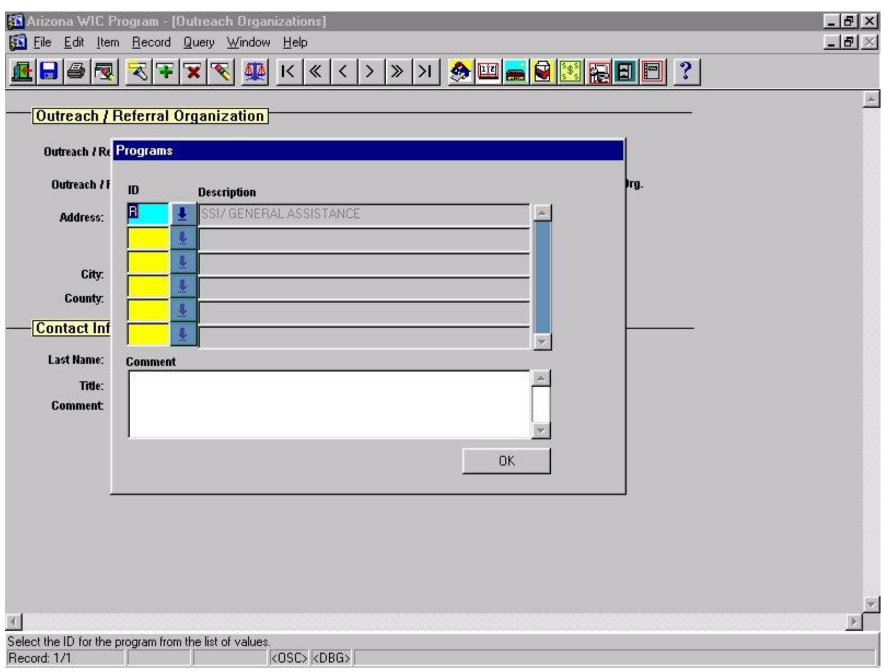


Figure 34 - Programs Pop-Up

14. Click the LOV for the ID field to select the code for the program category for which the Outreach/Referral Organization provides services.
    - This data comes from the Program Categories window in the Operations Management module. The Program Categories window must be completed prior to entering data on Outreach/Referral Organizations.

15. Tab to the Comment field and enter any applicable comments, if needed.

16. Click the OK button to close the pop-up and return to the Outreach/Referral Organizations window.
17. Click the Phone push button to display the Phone pop-up window. Enter Phone information for this Outreach/Referral Organization.
18. Click the Local Agencies push button to assign the outreach referral to an agency.
19. Click OK to close the pop-up.
20. Click the Save icon on the toolbar to save the data.
21. Click the Exit icon on the toolbar to return to the Operations Management main menu.

Tips, Tricks, and Shortcuts:

To update an existing Outreach/Referral Organization record:

1. Upon entering the Outreach/Referral Organization window, put the window into Query format by pressing the F8 key or clicking the Query icon on the toolbar.
2. Enter the Outreach/Referral Org. ID, the Name, and/or the Outreach/Referral Org. Type.
3. Execute the Query.
4. Update record as needed.
5. Click the Save icon on the toolbar to save updates.
6. Click the Exit icon on the toolbar to return to the Operations Management main menu.

Section 3: Staff Data

Section Concepts:

This window is used to enter new staff members and to maintain existing staff member data. This screen is an important step to creating your calendar. If you do not want the New Appointment Scheduler to display actual staff members' names on the appointment sheet, you must enter a unique identifier in the Alias field. You will use those "staff member aliases" when completing the Staff Day tables for the Calendar Build.

Step-by-Step Instruction:

Figure 35 - Staff Data Navigation

1. Click the Operations Management icon on the master menu.
2. Click Operations Mgt. on the Operations Management main menu.
3. Click Staff Data.

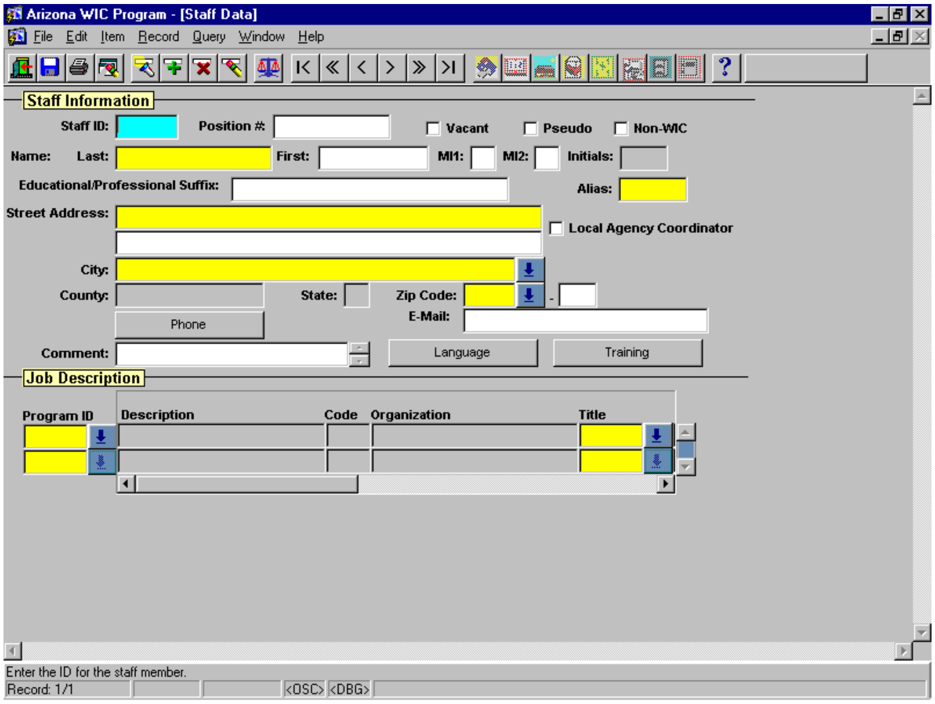


Figure 36 - Staff Data screen

4. With your cursor in the Staff ID field, press the Tab key to display a system generated Staff ID number.
   - When existing information displays on the screen, place your cursor in the Staff ID field and click the Add Record icon on the toolbar. The System clears the screen and automatically assigns the next available ID number.
5. Tab to the Position # field and type in the Position ID for this staff member. This is optional.
6. Tab to the Vacant checkbox and mark as checked if this position is currently vacant. This is optional.
   - If the Vacant checkbox is marked, the last name and first name are automatically named "Vacant" by the AIM System.
7. Tab to the Pseudo checkbox and mark as checked if this position is to be a pseudo position. This is optional.
   - A Pseudo staff position is used in the Appointment Scheduler module to allow for voluntary overbooking.
8. Tab to the Non-WIC checkbox and mark as checked if this position is not a WIC employee. This is optional.
   - This identifies a non-WIC staff member, such as a temporary employee.
9. Tab to the Name fields and enter the staff person's last, first, and middle initial.
   - The System displays the staff member's initial in the Initials field.
10. Tab to the Educational/Professional Suffix field and enter the staff person's educational or professional title, if desired.
11. Tab to the Alias field and enter a unique identifier for the WIC staff member.
   - The Alias can be a maximum of a six digit alphanumeric characters.
   - Each Alias name must be unique within the local agency, not to be duplicated.

- This Alias name will appear as the heading for each column of the staff member's appointment sheet and staff day screen.

12. Tab to the Local Agency Coordinator check box and mark as checked if this position is a Local Agency Coordinator.
13. Tab to the Street Address field and enter the address of where this staff person works.
14. Tab to the City field and enter the city, or select it from the LOV.
    - The System defaults the County, State, and Zip Code fields based on the City.
15. Click the Phone push button to display the Phone pop-up window. Enter Phone information for this staff member.
16. Click the OK button to save the data and return to the Staff Data window.
17. Tab to the E-Mail field and enter this person's email address, if available.
18. Tab to the Comment field and enter any applicable comments, if desired.
19. Click the Language push button to display the Languages pop-up window.

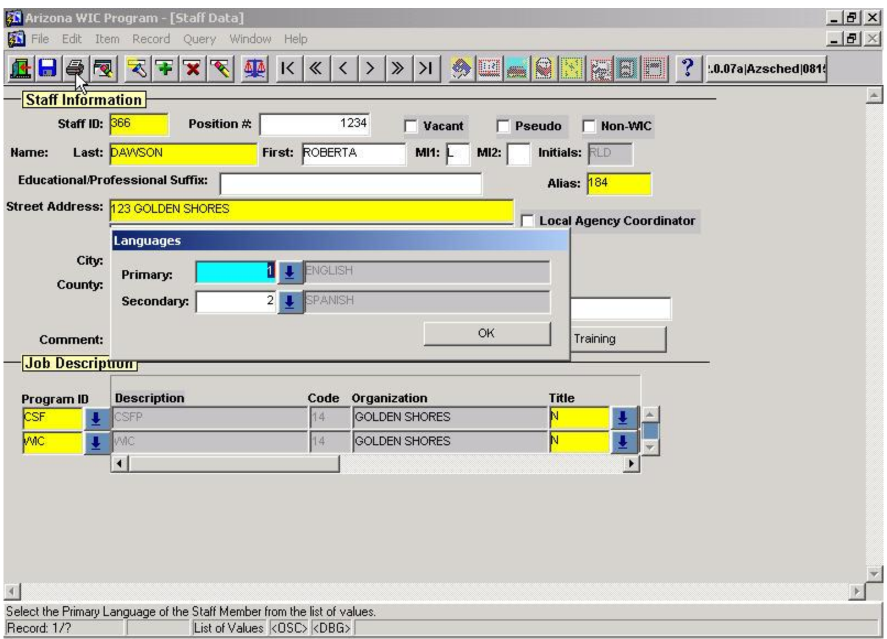


Figure 37 - Staff Data (Language Pop-Up)

20. Click the Primary LOV button and select the primary language for this staff member.
21. Click the Secondary LOV button and select a secondary language for this staff member, if applicable.
22. Click the OK button to close the pop-up and return to the Staff Data main window.
23. Click the Training push button to display the Training pop-up window (optional).

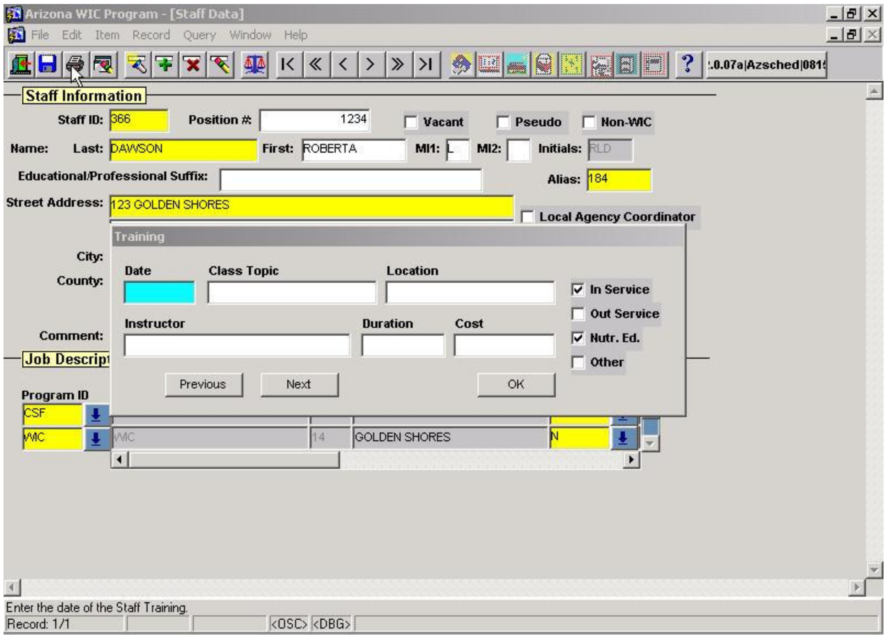


Figure 38 - Staff Data (Training Pop-Up)

24. Enter the Date the training session was conducted.
    - If this staff member has prior training records input to the AIM System, the most recent training record stored in the System for this staff member is displayed when the pop-up is initially displayed.
    - To add a new training record when prior records exist, click the Insert Record icon on the toolbar to create the space for a new record.
25. Tab to the Class Topic field and enter the name of the class.
26. Tab to the Location field and enter the location for this class.
27. Tab to the Instructor field and enter the instructor's first and last name.
28. Tab to the Duration field and enter the number of hours training this class provided.
29. Tab to the Cost field and enter the dollar amount charged for this class, if applicable.
30. Tab to the In Service checkbox and mark as checked if this training course was provided within the WIC Program.
31. Tab to the Out Service checkbox and mark as checked if this training course was not provided by the WIC Program.
32. Tab to the Nutr. Ed checkbox and mark as checked if this course provided training about nutrition education topics.
33. Tab to the Other checkbox and mark as checked if this course provided training about a topic other than nutrition education.
34. Use the Next and Previous push buttons or the VCR buttons on the toolbar to find other training records stored in the AIM System for this staff member.
35. Click the OK button to save the training information entered and to return to the Staff Data window.

36. In the Job Description section of the screen, tab to the Program ID field and select the Program(s) for this staff member from the LOV.
    - You must complete this line of data for every program where the staff person works.
    - The System displays the Description, Code, and Organization fields corresponding to the Program ID selected.
37. Tab to the Title field and select the staff person's title from the LOV.
38. Tab to the Salary field and enter the hourly dollar salary received by this staff member, if desired.
    - Even though a user may have access to this window, only those persons with the appropriate security clearance can view the Salary field.
39. Tab to the ERE% and enter the Employee Related Expenses percentage for this staff member.
40. Tab to the Start Date and enter the date the staff person began this job.
    - When the staff person ends this particular job function, the last day of employment needs to be entered in the End Date field.
41. Tab to the Hrs/Wk field and enter the hours per week for which this position is budgeted.
    - The AIM System displays the FTE Base field with the default value of 40.
    - Based on the Hrs/Wk and the FTE Base, the AIM System calculates and displays the FTE.
42. Tab to the Home Org check box and mark as checked, to designate the associated program as the job and organization as this staff person's primary job responsibility.
    - When marked, this designates the corresponding Program ID as the staff person's home organization.
    - The AIM System defaults the Address and Phone number data in the Staff Information section to the Local Agency address and phone number.
    - If the staff works in multiple clinics, still only one clinic is marked as the Home Org. In order for the staff information to display within the other clinics, those other clinics are to be added to the Security screen. Please refer to Chapter 2 for more information.

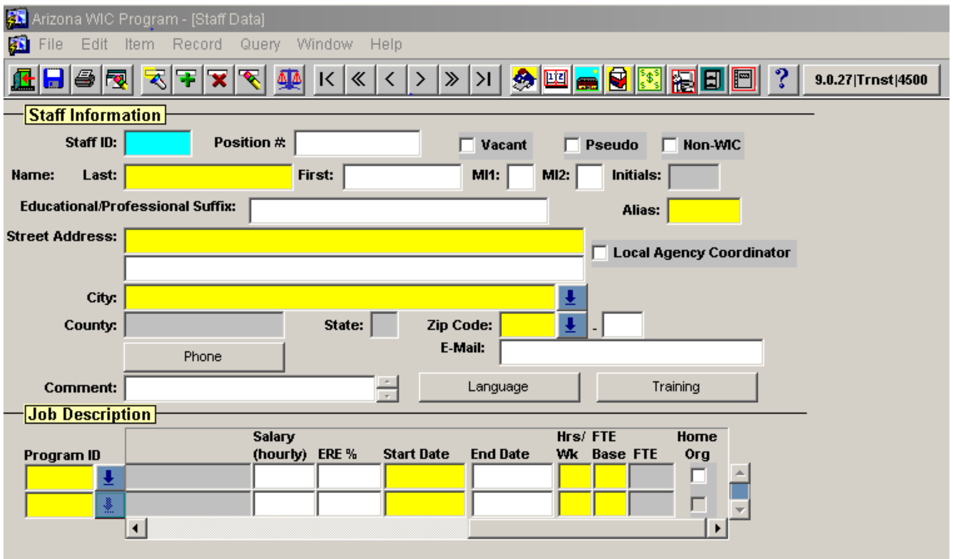


Figure 39 - Staff Data Job Description

43. Click the Save icon on the toolbar to save the data.
44. Click the Exit icon on the toolbar to exit the window and return to the Operations Management main menu.

TO UPDATE AN EXISTING STAFF MEMBER'S RECORD*:*

1. Update record as needed.
   - A staff member's existing job description in the Job Description section (in the Staff Data screen in the Operations Management module) cannot be changed. However, you may delete the job description and enter a new one with the appropriate changes.
   - A Program may be deleted successfully from a staff member unless there are conflicting appointments according to the message prompt. The appointments must be removed from the staff's schedule before a program is deleted and saved.
2. Upon entering the Staff Data window, put the window into Query format by pressing the F8 key or clicking the Query icon on the toolbar.
3. Enter the Staff ID and/or Last Name, and First Name fields.
4. Execute the Query.
5. Update record as needed.
6. Click the Save icon on the toolbar to save updates.
7. Click the Exit icon on the toolbar to return to the Operations Management main menu.

TO ENTER AN END DATE IN STAFF DATA FOR THE LAST DAY OF EMPLOYMENT:

1. Click in the End Date field and enter the correctly formatted end date (mm/dd/yyyy) of the staff member's last day of employment.
   - If an end date is entered into the End Date field, the staff does not appear on the Appointment Sheet, or in Staff Schedule screens, starting the day after the end date is entered.
   - If the staff had appointments on the appointment sheet beyond the End Date entered, the application will prompt the user to remove all conflicting appointments before attempting to terminate the staff.
   - If there are no conflicting appointments, the user will be able to Save and receive a Transaction Complete.
   - If a future date is entered into the End Date field, the staff will remain on the appointment sheet schedule until the day after the end date becomes effective. Because the termination is in the future, the staff information will remain in the Staff Schedule screens under Setup in the Appointment Scheduler, until the end date is effective.
2. Click the Save icon on the toolbar to save the data.

DELETING A PROGRAM:

1. Click the Program ID field to view the Program(s) for this staff member.
2. Click the Delete icon to remove the job description from the staff member.
    - A Program may be deleted successfully from a staff member unless there are conflicting appointments according to the message prompt. The appointments must be removed from the staff's schedule before a program is deleted and saved.
    - If deleting multiple job descriptions, save between each deletion.
    - A deletion of the Program results in the staff's schedule removed immediately, in real time.
    - The staff information is also removed from the Staff Schedule screens of the Appointment Scheduler.
3. Click the Save icon on the toolbar to save the data.

Chapter 3: System Administration

Chapter Preview:

This chapter describes how to use the Security window of the AIM System to assign and update user IDs, passwords and functional roles for WIC/CSFP staff members.

Chapter Objectives:

Upon completion of this chapter you will be able to:

- Correctly assign a password and security roles for a WIC/CSFP staff person.
- Successfully reinstate a forgotten password for a WIC/CSFP staff person.

Section 1: Security & Roles

Section Concepts:

The Security window is used to assign and reinstate User IDs and passwords for WIC/CSFP staff persons. This function will be used when a new employee is hired and if staff members need their password or expiration dates changed.

This window is also used to assign roles to all staff members. Security roles determine the areas of the AIM System to which a staff member has access. This function of the AIM System helps to ensure only qualified and trained staff members perform the given tasks.

When you first begin using the AIM System, or you have a new employee, you must complete both the password and role sections of the Security window in the System Administration module (located in the Master Menu). However, once an employee has been established in the Security window, you only need update the necessary sections.

Step-by-Step Instructions:

Figure 40 - Security Navigation

ASSIGN PASSWORDS AND ROLES TO NEW USERS

1. Click the System Administration icon on the Master Menu.
2. Click System Administration on the System Administration main menu.
3. Click Security.

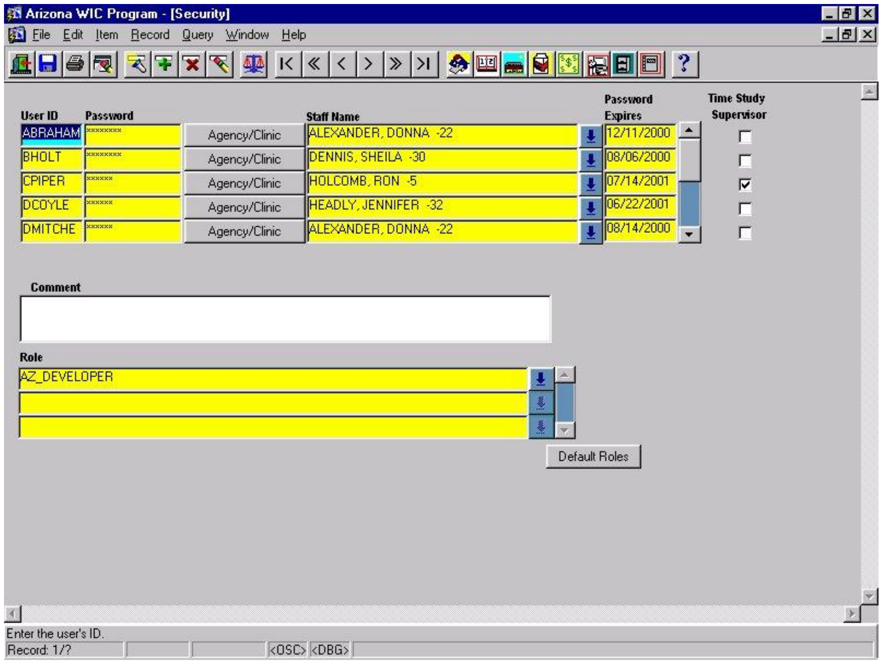


Figure 41 - Security screen

4. Enter your first staff member’s User ID.
   - The User ID can contain up to eight letters and/or numbers.
   - The designated person at each Local Agency will determine the format for the User ID.
5. Tab to the Password field and enter the password for this user.
   - The password must be four to ten letters and/or numbers long.
   - Users must change their password the first time they log-on to the AIM System.
6. Tab off the Password field and the System displays a Password Verification pop-up window.

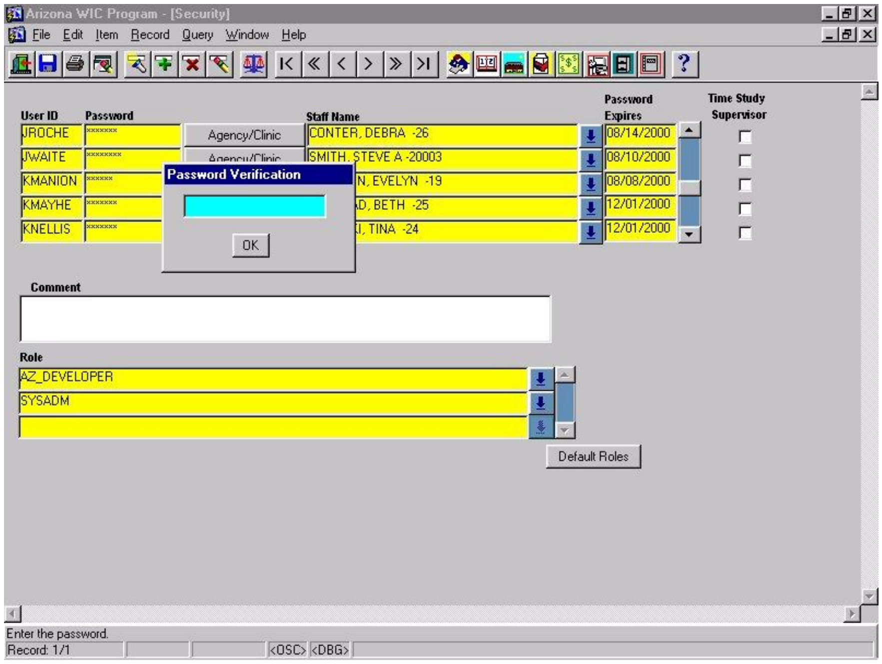


Figure 42 - Password Verification Pop-Up

7. Re-enter the same Password in the Password Verification pop-up.
   - The password verification is used to 'double-check' the accuracy of the first password entry.
8. Click the OK button to close the pop-up and return to the Security window.
9. Tab to the Staff Name field and select the staff person's name from the LOV. The name is pulled from the Staff Data information you entered in the Operations Management module.
10. Tab to the Password Expires field.
    - The System defaults this field to eight (8) calendar days from the date the password was first assigned.
11. Click the Agency push button to display the Agency pop-up window.

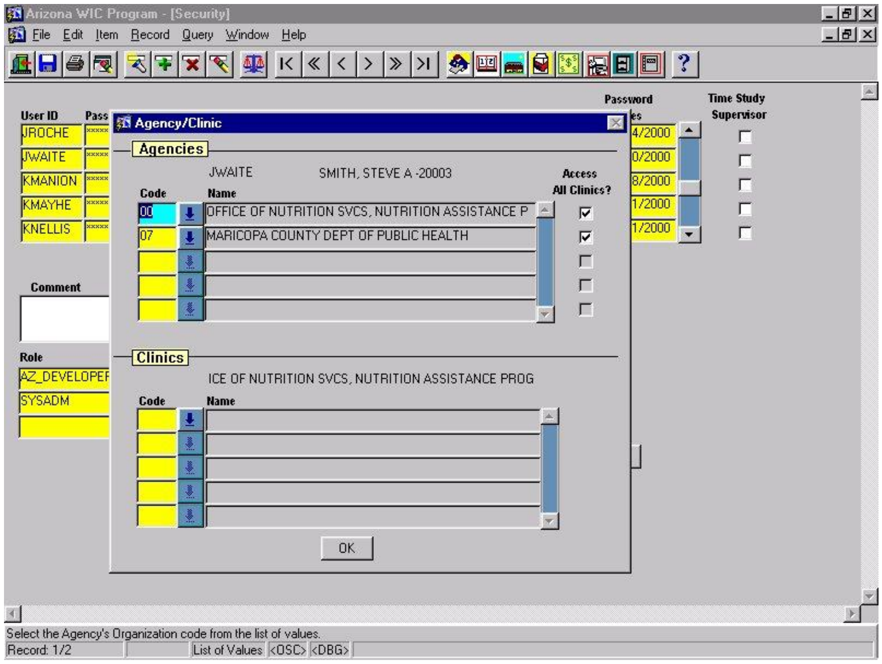


Figure 43 - Agency Pop-Up

12. Click the Code LOV and select the Local Agency for the staff person.
    - You must also select all clinics within the Local Agency for which this staff person will be given access to the AIM System.
13. Click OK to close the pop-up and return to the Security window.
14. Tab to the Comment field and enter any applicable comments, if desired.
15. Tab to the Role field and select the user’s security role(s) from the LOV.
    - Roles represent pre-defined groups of user privileges to various windows and functions within the AIM System.
    - A user can be assigned one or more roles, with up to a maximum of eleven (11) roles.
    - You would use this same process to change a user’s roles.
16. Click the Default Roles push button to display the message, “Do you want to change default roles to the user <username>?” with buttons for Yes and No as shown below:

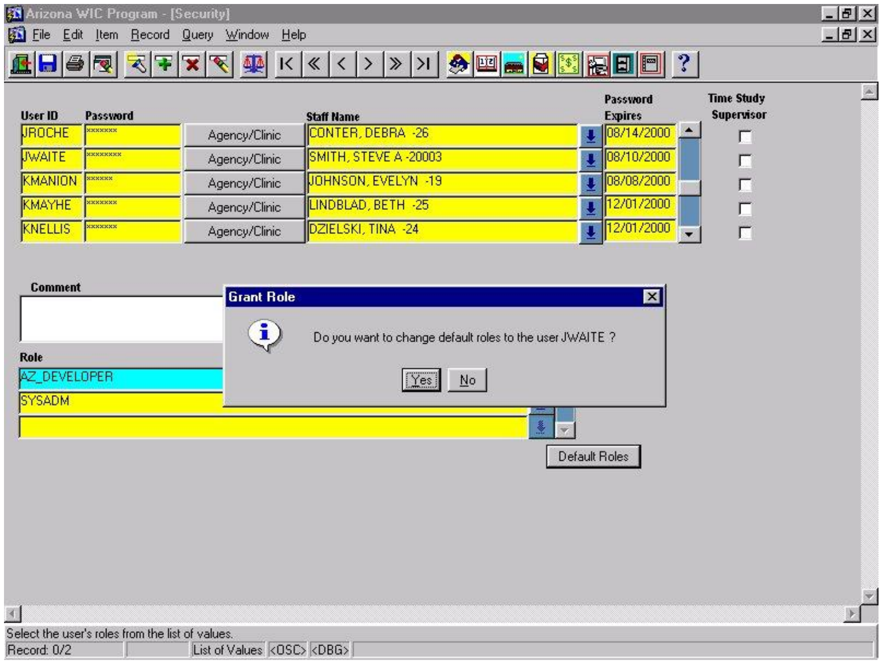


Figure 44 - New Roles Prompt

17. Click the Yes push button to proceed to the Granted Roles pop-up window.
    - If you click the No push button, the prompt closes and the System does not save any of the user's granted security roles.

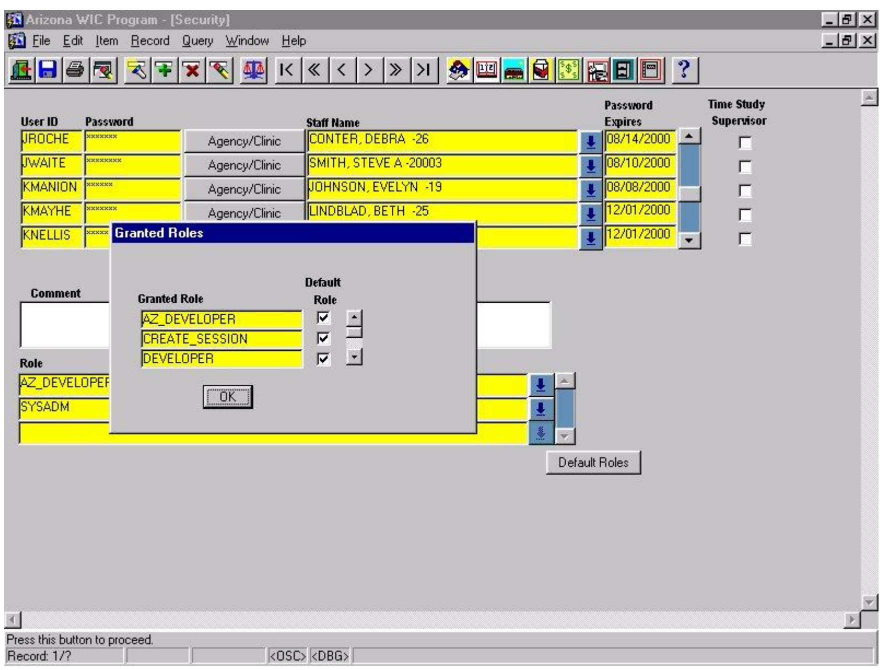


Figure 45 - Granted Roles Pop-Up

18. The Granted Role field displays the role(s) that are to be associated with this particular User ID. A role appears in this field if it is a basic AIM System role or if you have selected the role from the LOV on the Security window.
19. Check the Default Role checkbox for all Granted Roles this user is to be allowed to perform.
20. Click the OK button to return to the Security window.
21. Click the Save icon on the toolbar to save your data.
22. Click the Exit icon on the toolbar to leave this window and return to the System Administration main menu.

Special Note: If you do not make changes to the roles and accidentally push the Default Roles button, pushing No to the question "Do you want to change default roles to the user <username>?" will not erase the user's current roles. However, if you change (add, delete, etc.) the roles, press the Default Roles button and then press No to the question "Do you want to change default roles to the user <username>?", the system will erase the staff member's current roles.

UPDATING PASSWORDS AND ROLES

When you first begin using the AIM System, or you have a new employee, you must complete both the password and role sections of the Security window. However, once an employee has been established in the Security window, you only need update the necessary sections.

TO UPDATE PASSWORD:

1. Navigate to the Security Screen in the System Administration module.
2. Click the Password field you wish to update.
3. Remove the old password by using the backspace key or by clicking Item, then Clear from the pull down menu on the tool bar.
    - Do not use the Remove Record, Clear Form, or Clear Record icons or attempt to overwrite the password.
4. Type in the new Password.
5. Press the Enter or Tab key to display the Password Verification pop-up.
6. Click the Save icon on the toolbar to save the data.
7. Click the Exit icon on the toolbar to return to the System Administration main menu.

TO MODIFY AGENCY/CLINIC ACCESS:

1. Click the Agency/Clinic push button corresponding to the User ID you wish to update. The System displays the Agency pop-up window.
2. To remove an agency/clinic for this user, click the Code field for the agency, then click the Remove Record icon on the toolbar.
3. Or, to add more agencies/clinics for this user, with the cursor in the Code field, click the Insert Record icon on the toolbar. Then, select the additional agency/clinic from the LOV.
4. Click the Save icon on the toolbar to save the data.
5. Click the Exit icon on the toolbar to return to the System Administration main menu.

TO ADD A ROLE:

1. With the cursor in the Role field, click the Insert Record icon on the toolbar. Then, select the additional role from the LOV.
   - The Override Appointment security role will be assigned to those staff that find it necessary to override system messaging for the following types of appointments:
     - "Appointments that had a different service assigned than the one that was scheduled for that slot."
     - "Appointments in which the primary language of the staff member and family do not match."
     - "The override role will not allow the user to delete classes."
   - The Calendar Builder security role will be assigned to those staff that will build clinic and staff calendars, and delete classes.
2. Click the Default Roles push button and update as previously instructed.
3. Click the Save icon on the toolbar to save the changes.
4. Click the Exit icon on the toolbar to return to the System Administration main menu.

TO DELETE A ROLE:

1. With the cursor in the Role field you want to delete, click the Remove Record icon on the toolbar.
2. The AIM System automatically deletes that Role and displays the message, "Transaction completed."
3. Click the OK button to return to the Security window.
4. Click the Exit icon on the toolbar to return to the System Administration main menu.

Chapter 4: Appointment Scheduler

Chapter Preview:

A good Appointment Scheduling System is a vital part of well-organized and efficient clinic. In this chapter, you will learn how to create, maintain, and modify your clinic calendars using tables and grids. Creating and scheduling Class sessions will also be reviewed.

Chapter Objectives:

Upon completion of this chapter, you will be able to:

- Successfully create, maintain and modify your clinic(s) calendar.
- Successfully create and schedule Class sessions.
- Print reports necessary to clinic functions.

Section 1: Clinic Functions

Section Concepts:

You must establish the dates your office is closed, clinic hours, and clinic services/activities before the AIM System can build the calendar. The Maintain Clinic Tables window will allow you to enter specific hours of operation for each day of the week. This screen will also allow you to enter specific days that the clinic is closed in addition to holidays. A Local Agency may establish Dates Office Closed and Hours of Operation for all clinics in the local agency at one instance if all clinics are identical in dates closed and clinic hours of operation. Also, the clinic services and activities for the clinic are entered at this stage for each individual clinic.

Step-by-Step Instructions:

DATES OFFICE CLOSED TAB

1. From the Master Menu access the Appointment Scheduler module.

Figure 46 - Appt Setup Navigational Screen

There are days your clinics are closed due to holidays, mandatory meetings and training. Federal and State observed holidays are included in the Reasons Office Closed base table. When you build your monthly calendar, the system will **not** automatically check the Dates Office Closed base table and close the clinic on these days. The local agency director/supervisor is required to enter the Dates Office Closed manually, as well as other closures for County holidays or meetings. Clinic closures can be reversed if necessary.

2. Select Setup from the menu bar and then select Clinic Tables. The Dates Office Closed tab is displayed.

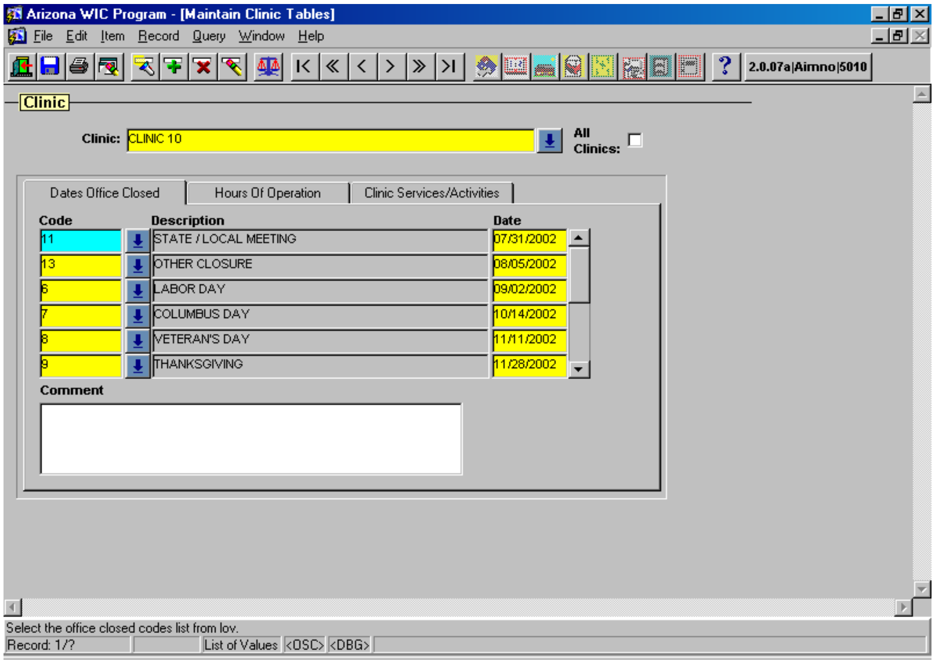


Figure 47 - Clinic Tables screen – Dates Office Closed Tab

Special Note: This window opens in a query mode.

3. Using the LOV, select the clinic you want to establish dates clinic closed for and execute the Query.
   - Log in to AIM clinics as "00", all clinics, to access the "All Clinics" checkbox. This allows you to enter the necessary information once and apply it to all the clinics in your Local Agency.
   - Click the "All Clinics" checkbox, if applying the "All Clinics" selection, before clicking the Save icon.
4. The Dates Office Closed screen will display the dates the clinic is closed, if any have been established.
5. To enter the dates your office is closed, click in the Code field and click the LOV.
   - Select the first closure reason necessary for your clinic. These reasons are maintained by the State Agency in the Reasons Office Closed table in the Appointment Scheduler module.
   - Press Tab twice, this will autopopulate the description and take you to the Date field.
6. Enter the date in the mm/dd/yyyy format.
7. Enter information in the next row using one of two methods:
   - Tab to the next row and fill in each row for the necessary clinic closures, or
   - Use the mouse and click in the next row and complete.

8. The Comments section is a free form note section for any comments you need to record about the clinic dates. Enter any comments you have about your clinic.
9. Save your work and acknowledge transaction completed.

HOURS OF OPERATIONS TAB

1. Select the next page tab (in Clinic Tables), Hours of Operation, while retaining the clinic from Dates Office Closed.

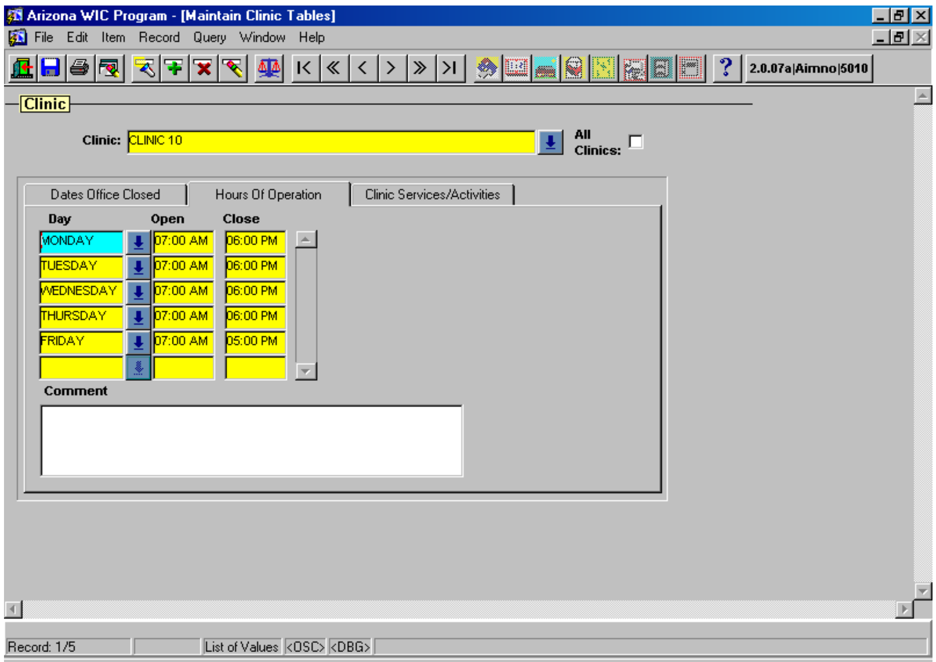


Figure 48 - Clinic Tables screen - Hours of Operation Tab

Special Note: **This window opens in a query mode*.***

2. Using the LOV select the clinic you want to establish hours for and execute the Query. The Operation Hour section will display the days of the week and open/close hours if any have been established.
3. This section should be blank for your clinic. Click in the Day field and click the drop down button. Select the first day of the week you want to assign hours. Press Tab.
   - Log in to AIM clinics as “00”, all clinics, to access the “All Clinics” checkbox. This allows you to enter the necessary information once and apply it to all the clinics in your Local Agency.
   - Click the “All Clinics” checkbox, if applying the “All Clinics” selection, before clicking the Save icon.
4. Enter the hours this clinic opens in the Open field. Press Tab twice.
5. Correct time format is XX:XX AM or PM.
6. Military time is accepted and will be converted.
7. Pressing Tab twice will put time in correct format and move you to the next field.
   - Enter the hours this clinic closes in the Close field. Press Tab once to format the time.

- Repeat this process for each day your clinic is open.

8. To move to the next row use the mouse and click in the field, or
9. Tab to next “Day” field.
10. The Comments section is a free form note section for any comments you need to record about the clinic hours. Enter any comments you have about your clinic.
11. Save your changes and acknowledge the transaction.

Special Note: To make any changes to this information you put the screen in Query mode, and then retrieve the clinic data you want to edit and click in the field you need to change. The results of changing the clinic hours of operation, either to expand or reduce hours, will be discussed later in the chapter.

CLINIC SERVICES/ACTIVITIES TAB

1. Select the next page tab(in Clinic Tables), Clinic Services/Activities, while retaining the clinic from Hours of Operation.

Special Note: **This window opens in a query mode.**

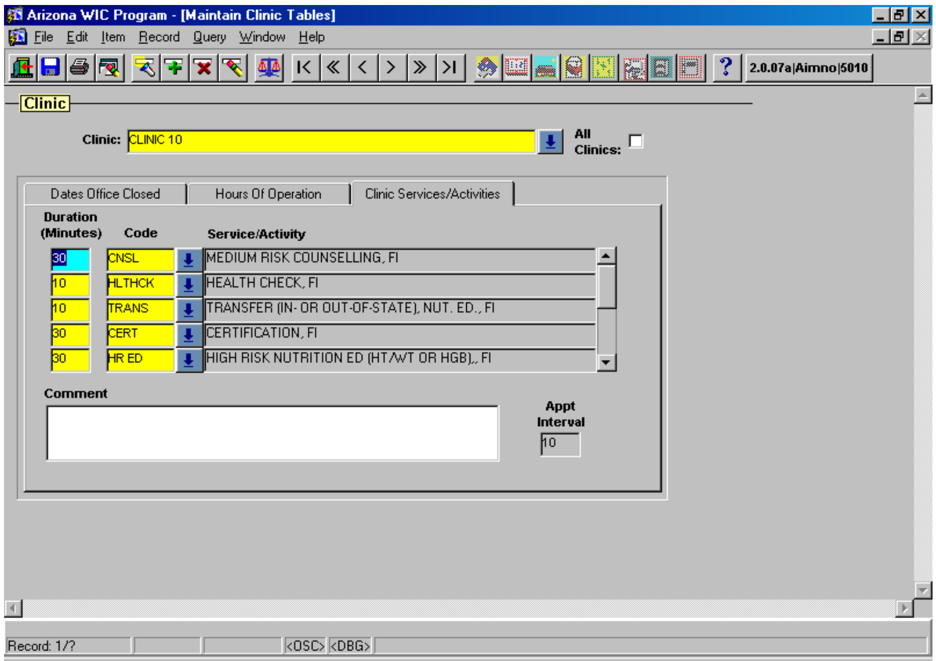


Figure 49 - Clinic Tables screen - Clinic Services/Activities Tab

2. Execute the query. If no records are found a message is displayed stating no matches were found.
3. Acknowledge this message.

1. For new clinics, information is not displayed because you have yet to establish clinic services/activities. You will do that now. Click in the first column and first row of Duration. The duration must be a multiple of the clinic's appointment interval.
   - The duration must be a multiple of the clinic's appointment interval. This information is established in the Organizational Units section. Although each type of appointment may be different lengths of time, they must all be based on one interval for each clinic.

Example: *You establish your interval to be 10 minutes. Each type of appointment will be based on 10 minute increments. Therefore, you cannot create a service of 15 minutes because your clinic appointment interval is established as 10 minute intervals.*

2. Tab to the Code column of the first row and click the LOV to select which service/activity will coincide with that designated time period. The description of that service/activity will populate as display only in the description field.
   - The LOV displays all services/activities available. You do not have to perform all these services every day.
3. Repeat the process for all types of appointments you have scheduled for this clinic.
   - Tab from the description field to the next available row to continue.
   - Use the down arrow key or the Insert icon to move to the next row.
   - If you need additional rows, use the Insert icon on the toolbar to generate a new row.
   - To remove a row use the Remove Record icon on the toolbar.
4. The Comments area is a free form note field you may use to enter any comments you have about this clinic day
5. Save your changes and exit the window. You are at the Appointment Scheduler main menu.

Section 2: Staff Schedule

Section Concepts:

Now that you have established work events for your Clinic, it is time to set up work events for the Clinic Staff. The first point of order is Staff Order. Staff Order is the place where staff are established on the appointment sheet based on their work availability each day of the week. Those staff with permanent work schedules will be placed at the beginning of the staff order. Those staff with varied work schedules will be placed towards the end of the staff order. Staff will view the most pertinent schedules on the appointment sheet without having to scroll through all staff members.

The next step is to complete Staff Day. The Staff Day Screen is where you document each staff member's days and hours. The information in this window reflects individual staff's flex schedule, part-time status, and if they are shared between clinics. Now that you have determined what activities/services you will perform in your clinic you need to assign staff to perform them. You can use the worksheets located in Appendix B to help you complete this function. It is important to remember what roles have been assigned to each staff to prevent any problems with scheduling. As previously mentioned, if you do not want your staff member's name associated with specfic appointment slots you will need to create the Alias names you want displayed.

Once you have staff assigned in your clinics, you need to determine when the staff is available to provide services to participants. The Staff Scheduler screen creates monthly schedules for a staff member based upon the Staff Day information entered. The staff schedule will be shown in the Appointment Sheet. A staff member can be cleared from the schedule on a monthly basis if there are no client appointments assigned to the staff member. Otherwise appointments will need to be moved or rescheduled. All open appointments slots can also be closed, retaining only those slots that have existing appointments.

The Edit Schedule screen allows you to edit a particular staff member or "all staff" members for a particular date. In addition, the user can fill the entire days' appointments, and reverse the process by clearing an entire days' schedule.

Step-by-Step Instructions:

STAFF ORDER TAB

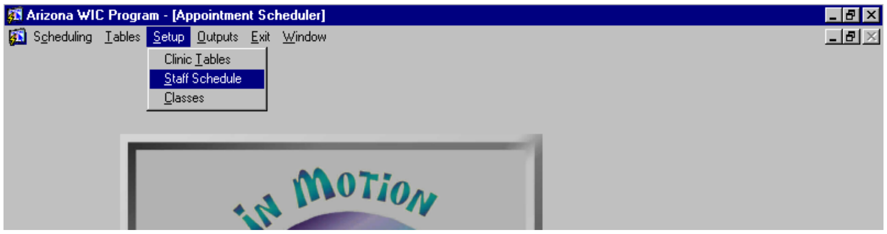


Figure 50 - Staff Schedule Navigation

1. From the Appointment Scheduler main menu select Setup from the menu bar. Then select Staff Schedule.

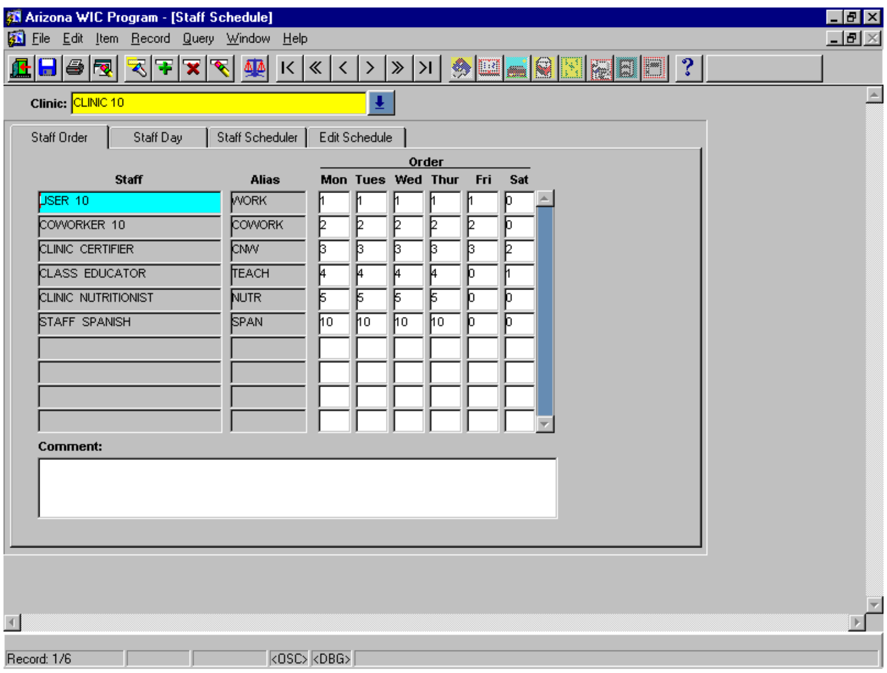


Figure 51 - Staff Schedule screen – Staff Order Tab

Special Note: **This window opens in a query mode.**

2. The first tab is Staff Order.
   - The first column is the Staff member's name.
     - This field is display only.
     - The information carries over from the Staff Data screen in Operations Management.
   - The second column is the Alias for the staff member.
     - This field is display only.

- The information carries over from the Staff Data screen in Operations Management.

➢ The next block of six columns is the Order table.

- This designates the order you want the staff to appear on the appointment sheet.
- Mark the column day of week with a zero if the staff is not working in the clinic that day.
- Space out your numbering to allow for staff order changes, or new employees.

Example: numbering in 5's provides adequate space from one staff order to another, thus reducing conflict.

3. The Comments field allows you to enter information about each staff member. You can leave this blank.
4. Select your clinic from the LOV.
   - The staff order fields populate with the staff entered in the Staff Data screen in Operations Management.
5. For the first Staff member, tab to the first staff order field – Monday.
6. Enter the order that the staff member is to appear on the appointment sheet on Mondays.
7. Tab to Tuesday and enter the order the staff member is to appear on the appointment sheet on Tuesdays.
8. Continue to enter the order for the staff member for the rest of the weekdays, and Saturday if applicable.
   - Remember, staff that are not available must have a zero value entered for the day of the week.
9. Save your work and acknowledge the transaction.

STAFF DAY TAB

1. Click the Staff Day tab while retaining the Clinic information.

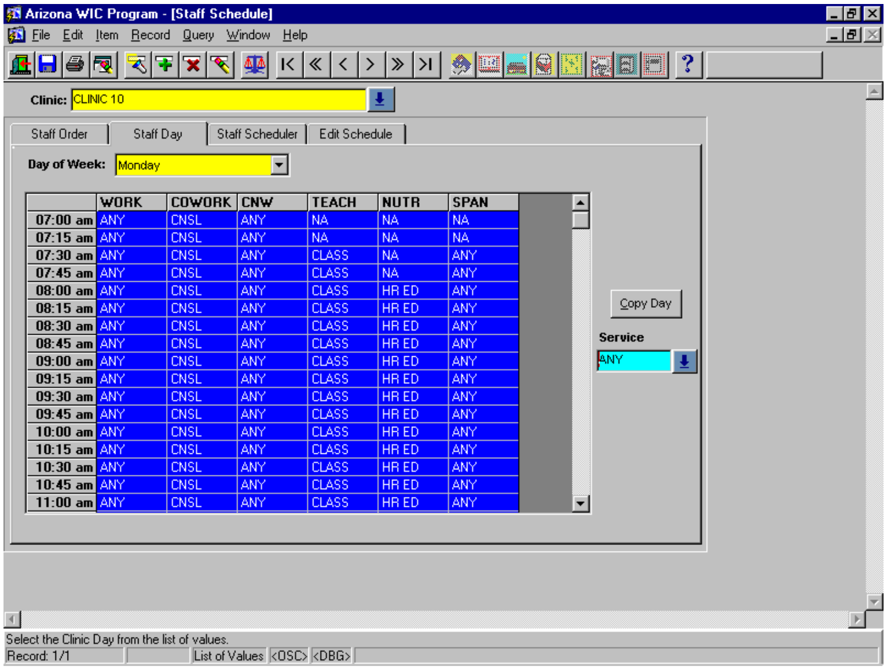


Figure 52 - Staff Schedule screen – Staff Day Tab

2. The Monday clinic hours and staff table is displayed.
   - The Operation Hours are established through the Clinic Tables.
   - The Time Interval for appointment slots is established in the Organizational Units – Next Page screen.
   - The Staff Aliases are carried over from Staff Data, and
   - The Staff column order is established in Staff Order.
3. Select the Day of the Week to create a Staff Day.
   - The fields default to N/A, not available.
4. Select the Service LOV and choose the service you want to assign to the staff member(s).
   - Staff whose work schedules start and end after the clinic has opened and closed should have the service NA assigned to the slots that they are not available to work.
   - Enter each service you want your first staff member to be able to perform in the appropriate time slot.
   - To change the Service, click the LOV and select a new service.
   - Remember to Save your work often.
5. Click the first cell of the first person you want to assign the Service to.
   - If that Staff member provides the service for longer than the selected time increment, then click and drag the mouse to the number of cells that need to be filled.

- If more than one staff provides the same service, click and drag the mouse over the number of cells necessary to fill for each staff.
- Or, click on the column header, the Alias name, and the selected service will fill all the cells vertically for that staff day.
- Or, click in the row on the time interval and the service will fill in all the cells horizontally for all the staff on that day for the particular time slot.

6. Save your work often and acknowledge the transaction.
7. To Delete or correct services, click in the cell that has a service/activity assigned to it.
   - Choose a service/activity.
   - Click and drag your mouse over the desired number of cells to delete or correct.
   - Complete this process for the desired number of cells to delete or correct.
8. Once you have completed the Staff Day for Monday, save your work.
9. Complete either of the following:
   - Continue to enter the Staff Day for the staff members for the rest of the weekdays, and Saturday if applicable.

   OR

   - Staff that have the same work schedules every day of the week can be copied using the Copy Day button.
   - The Copy Day button allows you to select the staff day for one or more staff and copy the information over to the remaining days of the week as necessary.
10. To copy a day's schedule. place a checkmark in the box for each day of the week that the Staff Day will copy the information to.

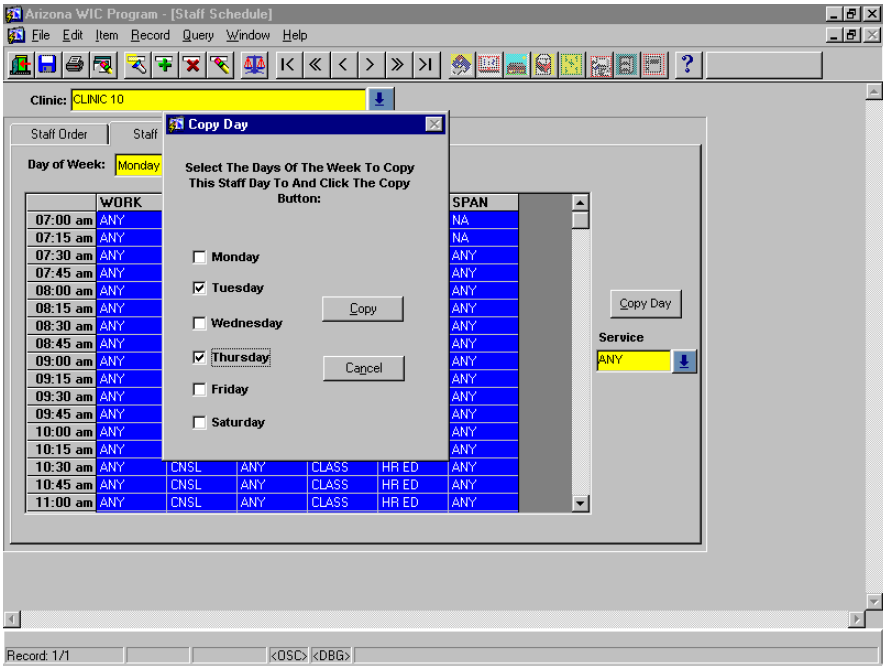


Figure 53 - Staff Schedule screen – Staff Day Tab: Copy Day Pop-up

11. Select Copy to complete the process. Or select Cancel if you wish to abort the transaction and start over.
12. Acknowledge the successful copy, and click the Cancel button to leave the pop-up screen.
13. Save your work often.

Example: Staff 1 and Staff 2 work consistent schedules each day of the week, but Staff 3 and Staff 4 work varying schedules throughout the week. Create a Staff Day for Staff 1 & 2, select the Copy Day button and select the days of the week you wish to copy the Staff Day to. Next fill in the Staff Day for Staff 3 & 4. If you are not able to use the Copy Day functionality, then use the Day of Week LOV to complete the Staff Day screens.

STAFF SCHEDULER TAB

1. Click the Staff Scheduler tab while retaining the Clinic information.

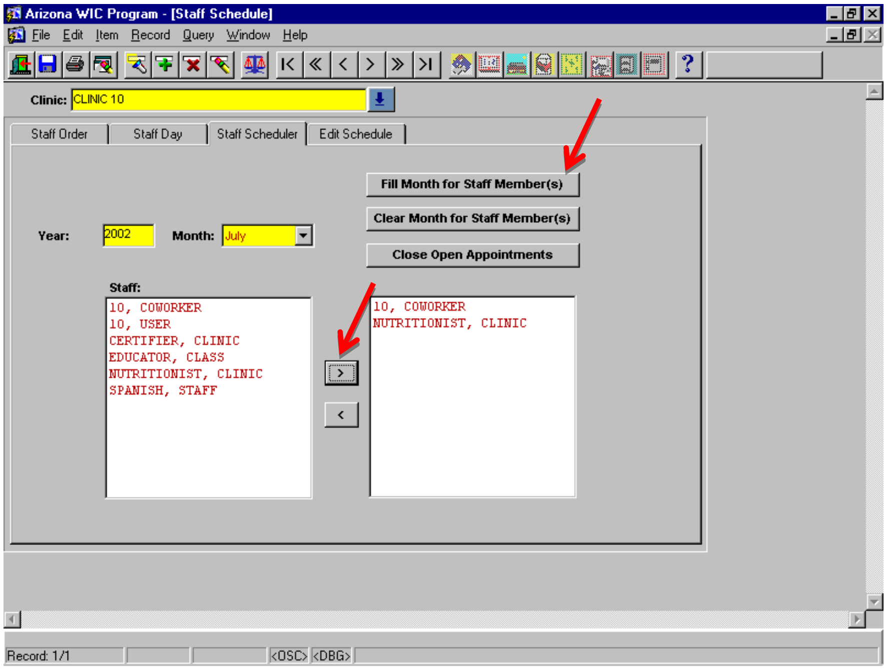


Figure 54 - Staff Schedule screen – Staff Scheduler Tab

- You will publish staff to the calendar on a Monthly basis.
- The Staff members in your clinic appear in the Staff box.

8. Select the Year and the Month of the clinic you wish to publish staff to.
   - These fields default to the current Month and Year.
9. Select the Staff you want to publish to the calendar for the selected month(s).
   - Select one month at at time.
   - Double click the staff name to move the information to the box to the right, or
   - Highlight the staff name and use the Right Arrow arrow to move the information over.
   - To remove a name from the Right box, complete the previous two processes to move the staff name(s) back to the Left box.
10. Select the Fill Month for Staff Member(s) button.
11. A statement stating how many appointment slots have been created will appear. Acknowledge the transaction. If there is an error in creating appointment slots go back to the previous screens and find the error.
12. Continue with the Fill Month for Staff Member for necessary months.
13. The Clear Month for Staff Member(s) button is used to remove a schedule for the month selected for the staff member(s) of the clinic.
14. The Clear Month for Staff Member(s) functionality is performed only if there are no appointments scheduled to the staff member. If appointments exist, then the system will close only open appointment slots via the Close Open

Appointment Slots button. For existing appointments, you will need to move previously scheduled appointments using the rescheduling of appointments functionality. This will be discussed later in Section 4.

EDIT SCHEDULE TAB

1. Click the Edit Schedule tab while retaining the Clinic information.

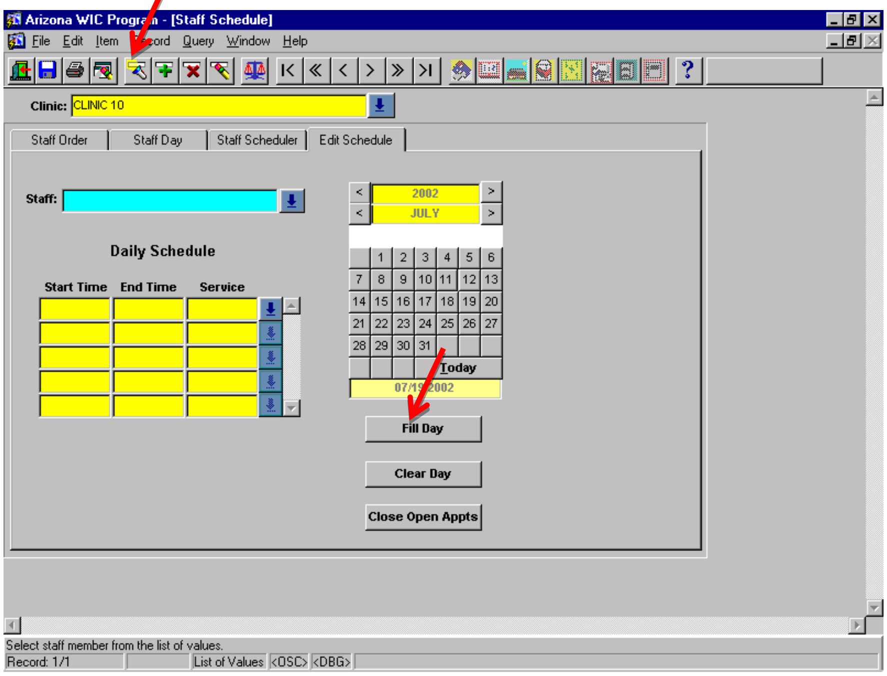


Figure 55 - Staff Schedule screen – Edit Schedule Tab

- After publishing a monthly schedule for a staff member based on the Staff Day, you are able to edit a staff member's daily schedule.
- The daily schedule information is established in Staff Day and Staff Scheduler.
- You can input data upon entering the screen.

3. Select the Staff from the Staff field LOV.
   - An "All Staff" option selects every staff member.
4. Select the month, day, and year from the Calendar you want to Edit.
5. Click the query icon to populate the Daily Schedule table.
   - If a schedule has not been created in Staff Scheduler, the fields will be blank.

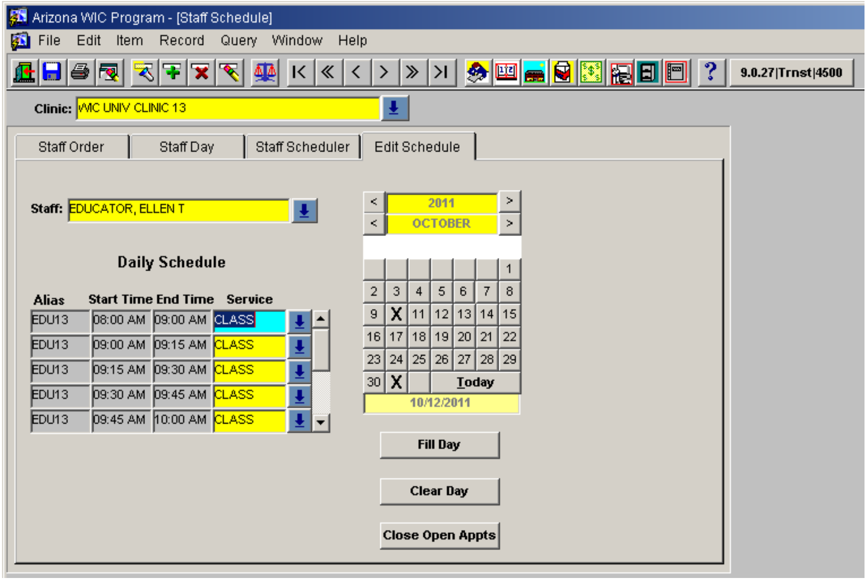


Figure 56 - Staff Schedule screen – Edit Schedule Tab (Fill Day)

6. Make the changes in the Daily Schedule table by,
   - Adding a new row of information,
   - Changing the Service, or
   - Deleting time from the table.
     - ➢ The Fill Day button is used to create a single calendar date for a selected staff member or all staff.
     - ➢ The Clear Day button is used to delete a calendar date from the schedule and prevent appointments from being scheduled.
     - ➢ The Close Open Appointments button has the same functionality as in the Staff Scheduler screen. A Conflicts Report notifies you of the appointments to be rescheduled or deleted.

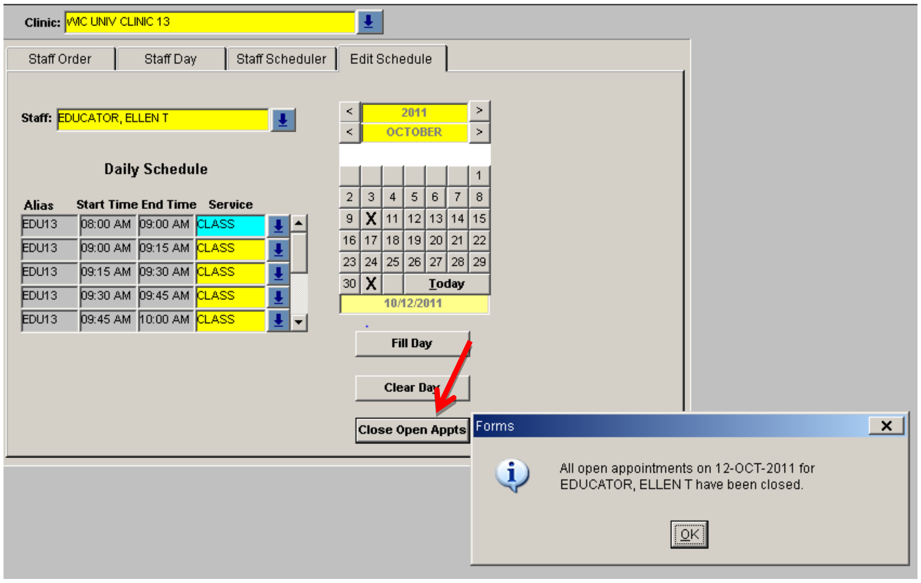


Figure 57 - Staff Schedule screen – Edit Schedule Tab (Close Open Appts)

7. Save your work. Acknowledge the transaction. Exit back to the Appointment Scheduler main menu.

We will discuss editing a daily schedule with appointments later in Section 4.

Warning Message:

- If you try to close the clinic, and appointments have already been scheduled, the System will display a message stating “The Clinic cannot be closed for the date entered since participant appointments have been scheduled.” You would need to go in and cancel or reschedule all appointments scheduled for that date and then close the clinic.

- A calendar date with an “X” over it indicates that the clinic is closed. Clicking on the calendar date will display a clinic closed message.

Section 3: Classes

Section Concepts:

Class/Group education is an efficient and effective means of providing participants with Nutrition information. Whether you have class sessions scheduled daily or just occasionally, the AIM System provides you with a flexible and efficient method for creating and maintaining these sessions.

The Classes are established based on categories. These Class Categories are State defined and maintained to ensure consistency across Local Agencies. Class Categories will have specific topics and classes established under each category.

You will create Classes that can be reused again in the future. Classes can be created in advance and published to a calendar date at a later time in the Schedule Class Day tab.

The Class Day screen pulls all the classes together the clinic offers in a day so multiple classes can be scheduled later in Schedule Classes screen.

Step-by-Step Instructions:

1. From the Appointment Scheduler main menu select Setup from the menu bar. Then select Classes.

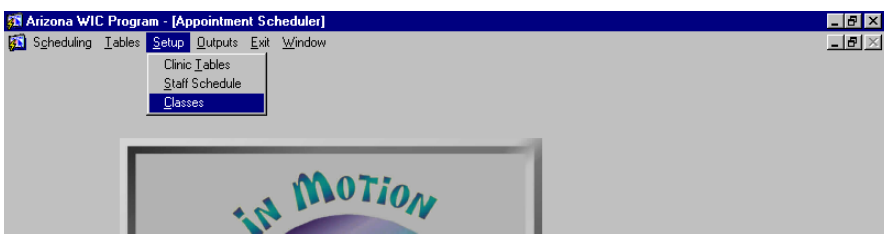


Figure 58 – Class Setup

2. The screen opens up to the first tab, Class Categories.

Special Note: This window opens in a query mode.

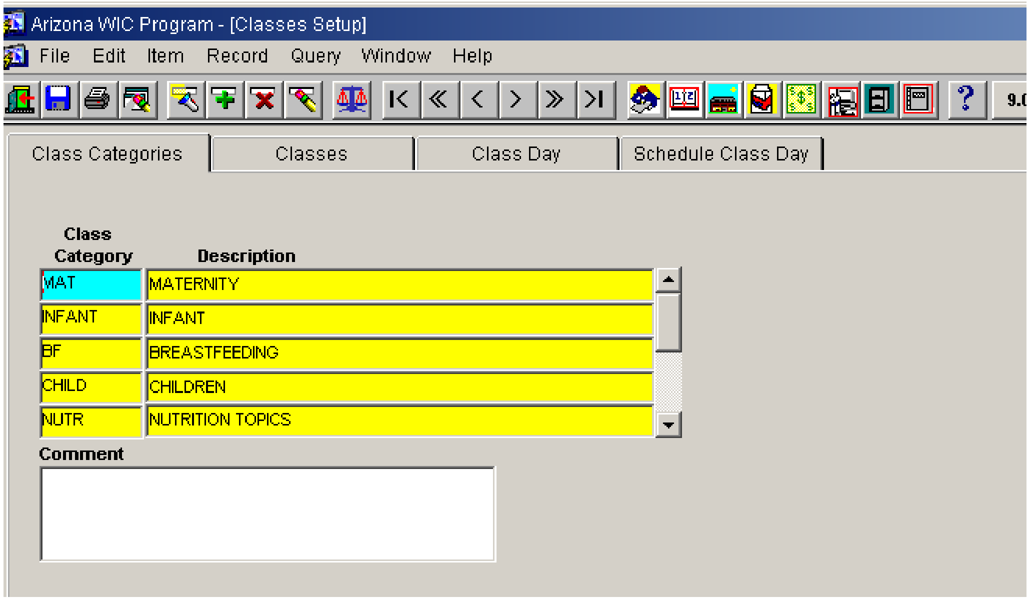


Figure 59 - Classes Setup screen – Class Categories Tab

3. Execute the query to retrieve table information.
   - This table is maintained by the State.
4. The Comments field allows you to enter information about each class category. You can leave this blank.

CLASSES TAB

1. Click the Classes tab.

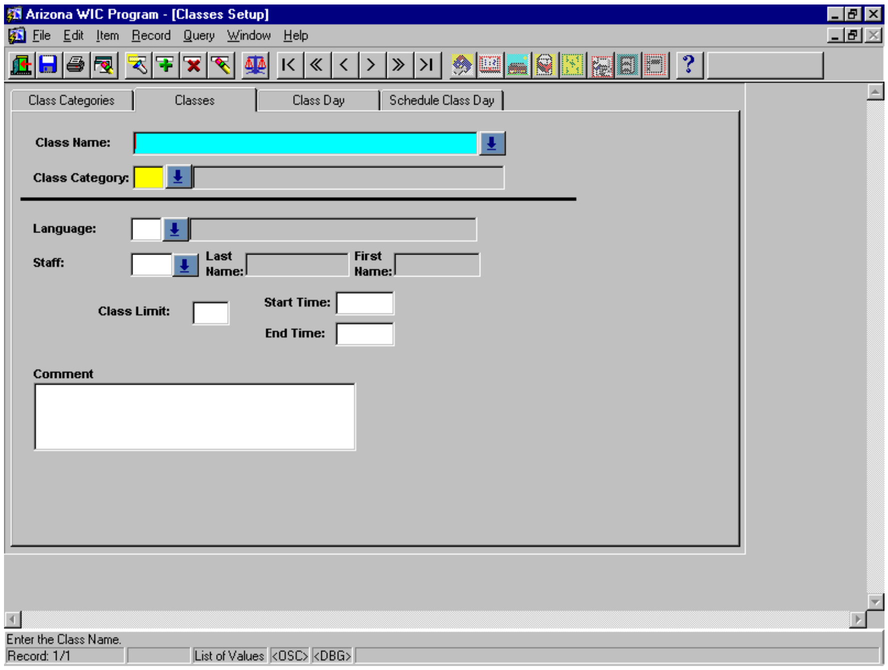


Figure 60 - Classes Setup screen – Classes Tab

Special Note: **This window opens in a query mode.**

2. The classes tab is the screen used to enter new class information or lookup existing classes and modify the information.
3. Two mandatory fields exist in this screen: class name and category.
   - The Class Name is specific to what type of category you select.
   - The Class Category is carried over from the Class Category table.
4. The remaining fields are optional fields for entering data.
   - Language – the language that the class is taught in.
   - Staff – the Alias (or the id #) of the instructor.
   - Class Limit – the maximum number of unique families that will be scheduled to the class.
   - Start Time – the time the class will start.
   - End Time – the time the class will end.
5. Cancel the query to put the screen into an entry mode.
6. Enter the Class name specified on your Activity Sheet.
7. Enter the Category specified on your Activity Sheet.
8. Save your work.

CLASS DAY TAB

1. Click the Class Day tab.

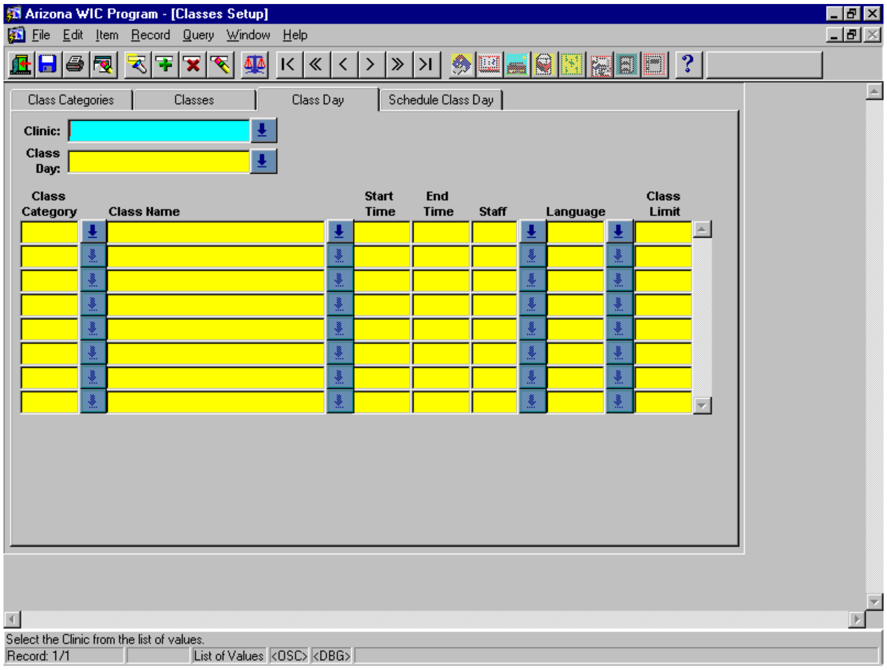


Figure 61 - Classes Setup screen – Class Day Tab

Special Note: **This window opens in query mode.**

2. Select the clinic you want to schedule the class for.
   - Classes will only be seen for the clinic you are logged in to.
   - If you are logged in at the local agency level, then you will be able to individually view each clinics classes within the local agency.
3. Create a Class Day for the single or multiple classes listed.
   - Fill in the row for each class time offered.
   - The row is mandatory and must be complete before moving on to the next row.
   - Class length of time can be less than the time period designated in the Clinic Services/Activities tab, but not greater than the time designated in the Clinic Services/Activities tab.
4. Save your work.

SCHEDULE CLASS DAY TAB

1. Click the Schedule Class Day tab.

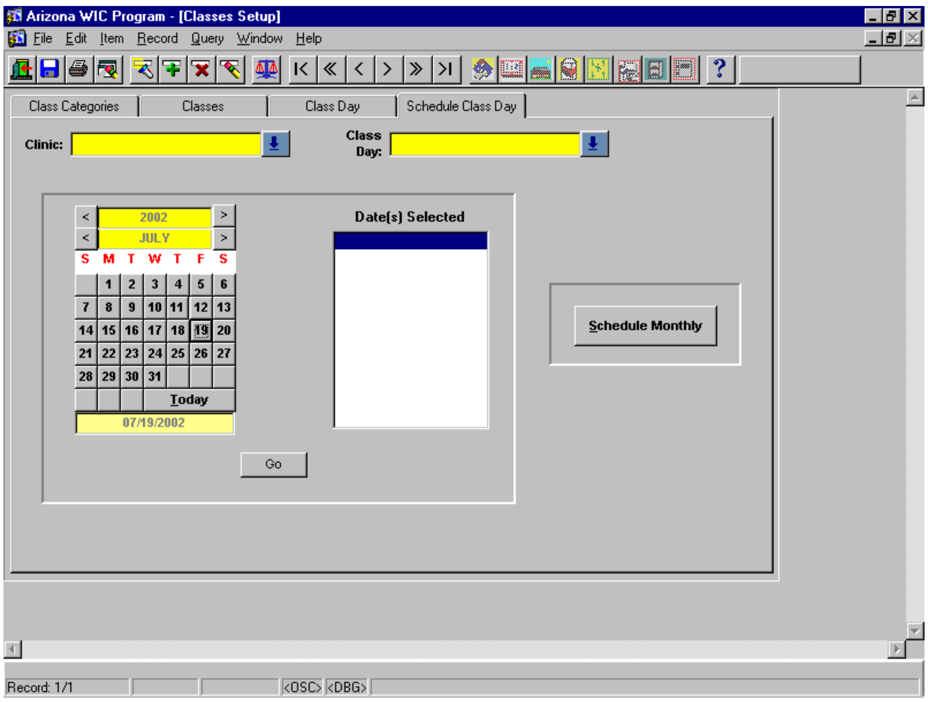


Figure 62 - Classes Setup screen – Schedule Class Day Tab

Special Note: **This window opens in query mode.**

2. Select the clinic and the Class Day you want to to build classes for.
3. Either select the calendar date(s) you want to publish those classes to and click GO, or
4. Select Monthly to choose the year, month(s), and day(s) you regularly hold classes.
   - Selecting by the Calendar Date provides you easy scheduling if classes are held sporadically.
   - Yet selecting the Monthly option provides consistency for regularly held classes.

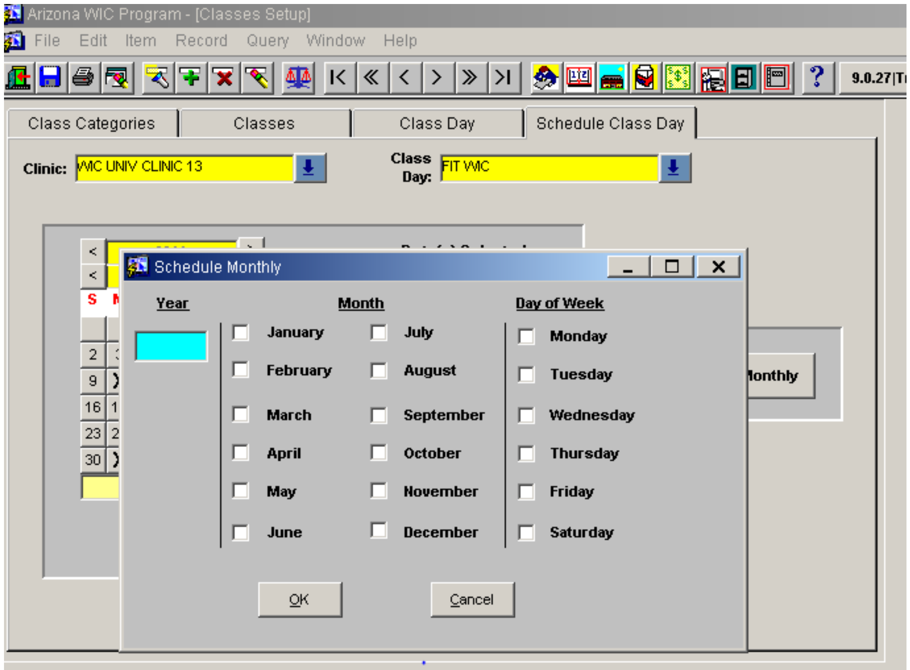


Figure 63 - Classes Setup screen – Schedule Monthly Button

5. Save your work and click OK to complete the transaction.

Section 4: Scheduler Edits

Section Concepts:

This section discusses the methods of editing your existing calendar from the clinic hours to the staff schedule once appointments have been created. The following edits are performed in the Hours of Operation, Staff Schedule, Edit Schedule screens, and Classes from the Appointment Sheet.

You will learn to…

- Expand and/or reduce the clinic hours of operation.
- View, print, and utilize the Conflicts report for changes made to the scheduler.
- Close open appointments.
- Remove staff from the scheduler on a monthly basis.
- Remove staff from the scheduler on a daily basis.
- Delete a class from the Appointment Sheet.

Step-by-Step Instructions:

HOURS OF OPERATION – REDUCE AND/OR EXPAND

The need may arise to change the clinic hours of operation once the scheduler has been established. A "checks and balances" is in place to notify you the action that takes place in the Staff Day screen once the decision to reduce and/or expand the clinic hours of operation.

1. In the Appointment Scheduler module, click Setup and select Clinic Tables.
2. Select your clinic from the LOV in Dates Office Closed and query.
3. Select the next page tab, Hours of Operation, while retaining the clinic from Dates Office Closed.
4. Change the Closing Hours of Operation as desired.
5. Acknowledge the system messaging.
   - If you reduce the hours of operation while appointments exist, you are required to "move" the conflicting appointments to shorten the workday.

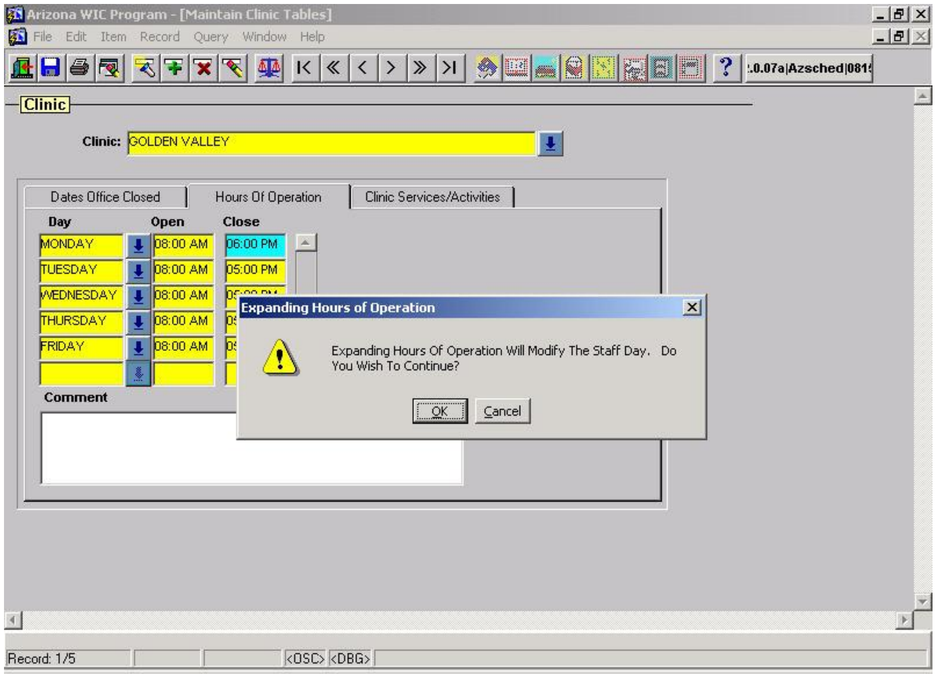


Figure 64 - Maintain Clinic Tables screen – Hours of Operation Tab

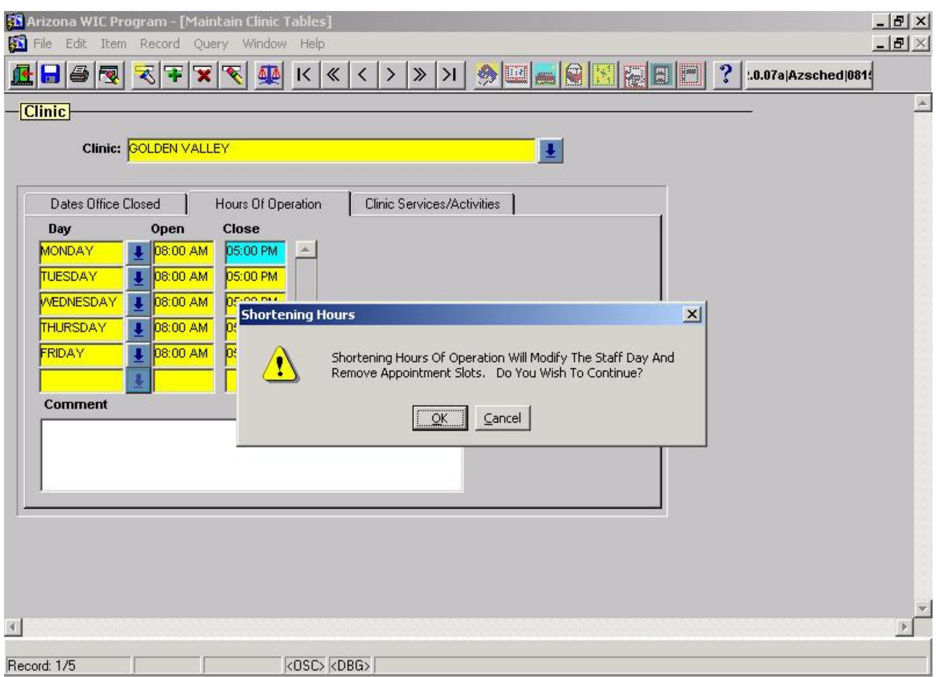


Figure 65 - Maintain Clinic Tables screen – Hours of Operation Tab

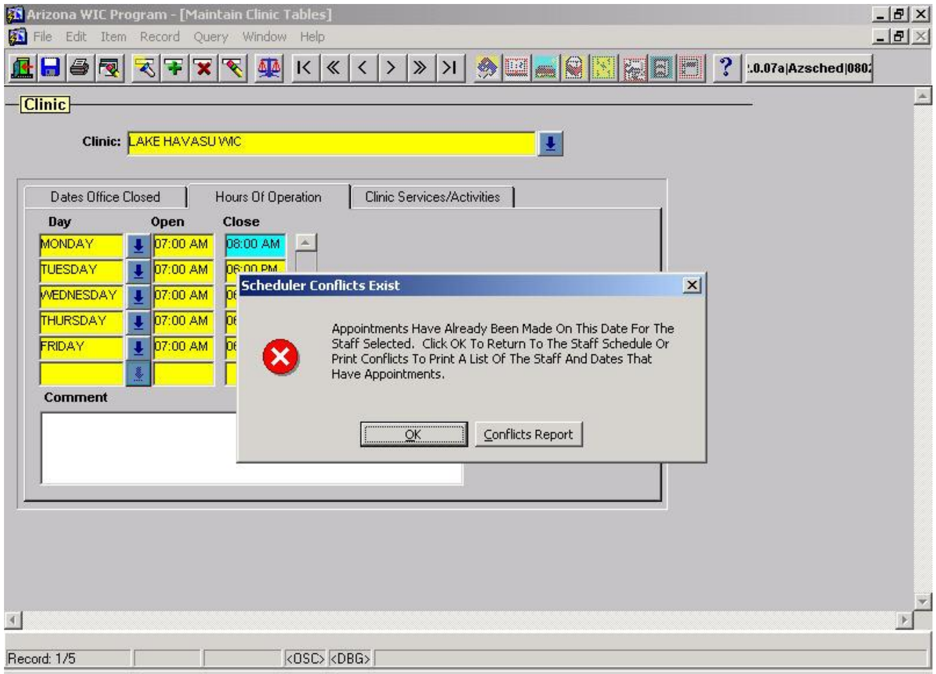


Figure 66 - Maintain Clinic Tables screen – Hours of Operation Tab

6. Exit the Clinic Tables and update the Staff Day time slots (in the Appointment Scheduler module under Setup and Staff Schedule) and publish to the schedule to reflect the change.
    - If you extend the hours of operation, staff will need to be assigned Not Available or Services/Activities to compensate for the change in clinic hours.
    - Publish staff/all staff changes to the schedule via the Edit Schedule tab (in the Staff Schedule screen).

STAFF SCHEDULE – CLEAR FOR THE MONTH WHEN APPOINTMENTS EXIST

From time to time, staff may need an extended period of time off work. It is a simple process to remove the staff member from the scheduler for a month or more at a time.

You can use Clear Month for Staff Member(s) for those staff without appointments scheduled in the appointment sheet. If appointments exist for the staff you are attempting to clear from the scheduler, then you must Close Open Appointment slots which automatically run the Conflicts Report viewed on the screen, and printed if necessary. Closing open appointments first ensures that additional appointments are not created for the staff member needing the month cleared. The Conflicts Report lists the slots that have appointments scheduled for whom the schedule you are clearing. Reschedule the appointments for the staff member in order to clear the month for the staff member.

1. In the Appointment Scheduler module, click Setup and select Staff Schedule.

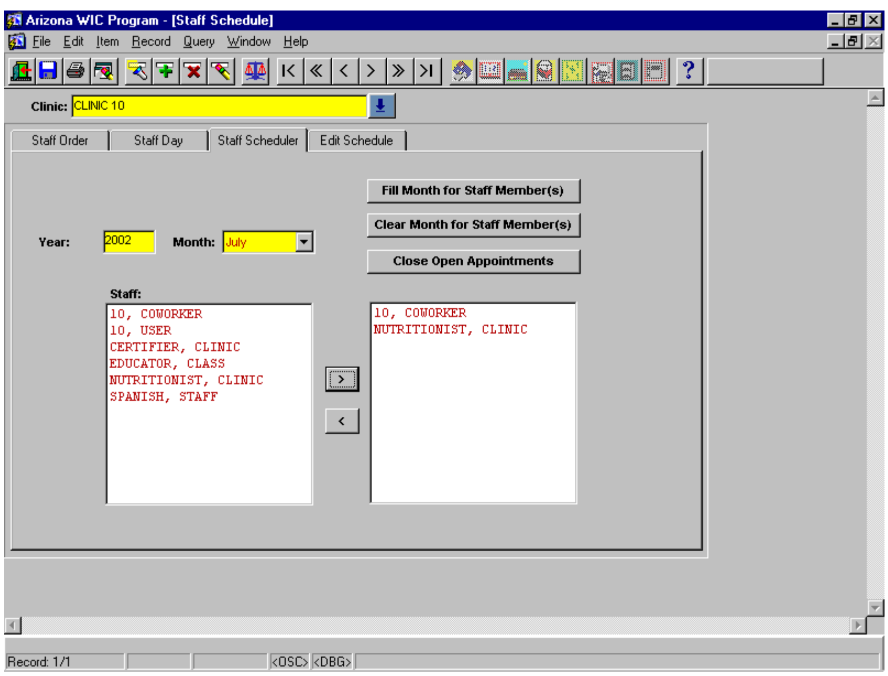


Figure 67 – Staff Schedule Tab

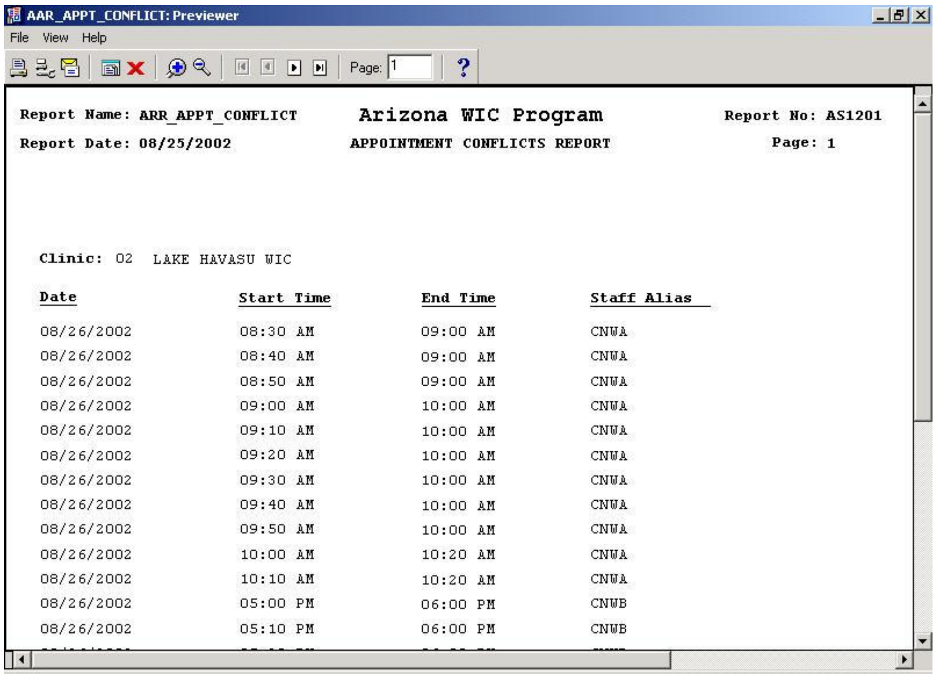
2. Select your clinic from the LOV.
3. Click the Staff Scheduler screen.
4. Select the year and month the staff member(s) need(s) to be cleared from.

5. Select the staff member(s) to be cleared for the month from the scheduler by moving them to the box on the right.

5. Click the Close Open Appointments button.

6. Acknowledge the message that open appointment slots were closed.

7. View the Conflicts Report and reschedule the appointments in conflict with clearing the month for the staff member.



AAR_APPT_CONFLICT: Previewer

File View Help

Page: 1

Report Name: ARR_APPT_CONFLICT   Arizona WIC Program   Report No: AS1201
Report Date: 08/25/2002   APPOINTMENT CONFLICTS REPORT   Page: 1

Clinic: 02 LAKE HAVASU WIC

Date	Start Time	End Time	Staff Alias
08/26/2002	08:30 AM	09:00 AM	CNWA
08/26/2002	08:40 AM	09:00 AM	CNWA
08/26/2002	08:50 AM	09:00 AM	CNWA
08/26/2002	09:00 AM	10:00 AM	CNWA
08/26/2002	09:10 AM	10:00 AM	CNWA
08/26/2002	09:20 AM	10:00 AM	CNWA
08/26/2002	09:30 AM	10:00 AM	CNWA
08/26/2002	09:40 AM	10:00 AM	CNWA
08/26/2002	09:50 AM	10:00 AM	CNWA
08/26/2002	10:00 AM	10:20 AM	CNWA
08/26/2002	10:10 AM	10:20 AM	CNWA
08/26/2002	05:00 PM	06:00 PM	CNWB
08/26/2002	05:10 PM	06:00 PM	CNWB

Figure 68 - Appointment Conflicts Report

8. In the appointment sheet, reschedule the conflicting appointments.

9. Save the rescheduled changes as you perform them.

10. Return to the Staff Scheduler screen.

11. Repeat Steps 4 and 5.

12. Click the Clear Month for Staff Member(s).

13. Acknowledge the transaction.

EDIT SCHEDULE – DAILY FOR STAFF

This functionality works much in the same way as "clear month for staff member(s)", but instead editing the staff schedule is done on a daily basis.

You can use Clear Day for those staff without appointments scheduled in the appointment sheet. If appointments exist for the staff you are attempting to clear from the scheduler, then you must press the Close Open Appts button, this action will cause the system to run the Conflicts Report and display it on the screen. You can also print it if necessary. Closing open appointments first ensures that additional appointments are not created for the staff member needing the month cleared. The Conflicts Report lists the slots that have appointments scheduled for whom the schedule you are clearing. Reschedule the appointments for the staff member in order to clear the month for the staff member.

1. In the Appointment Scheduler module, click Setup and select Staff Schedule.

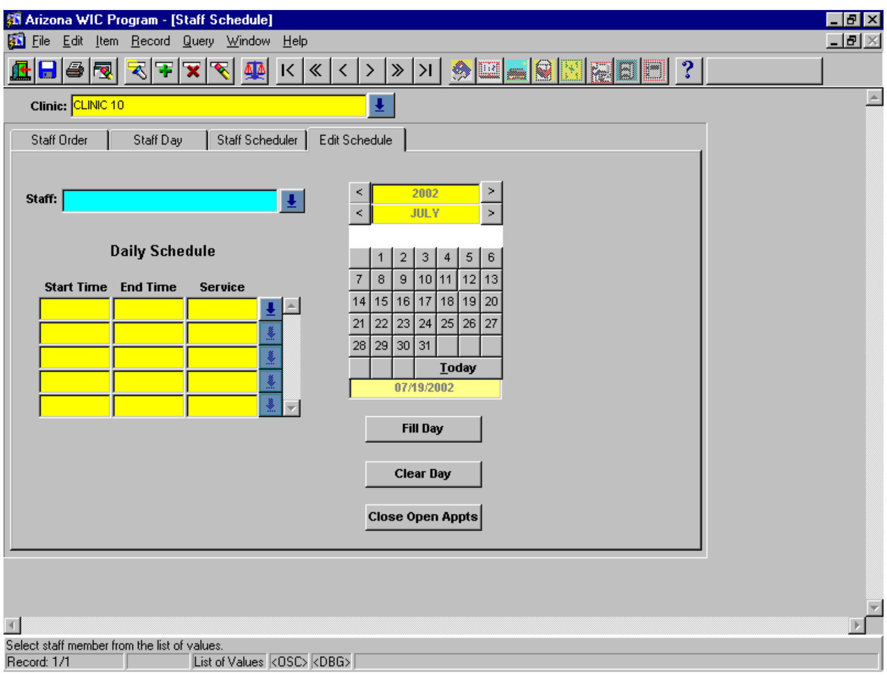


Figure 69 – Edit Schedule Tab

2. Click the Edit Schedule tab while retaining the Clinic information.
3. Select the Staff from the Staff field LOV.
   - An "All Staff" option selects every staff member.
4. Select the month, day, and year from the Calendar you want to Edit.
5. Click the query icon to populate the Daily Schedule table.

6. To clear a day for a staff that already has appointments, you must first click Close Open Appointments for the desired date.
7. All the open appointment slots are filled with N/A. This prevents the staff from making appointments to that staff.
8. View the Conflicts Report and reschedule the appointments in conflict with clearing the month for the staff member.
9. In the appointment sheet, reschedule the conflicting appointments.
10. Save the rescheduled changes as you perform them.
11. Return to the Edit Schedule screen.
12. Query the date and staff again.
13. Select the Clear Day button to clear the day. The hourglass indicates the system is processing the command. Next, a message appears indicating that the date is clear. The Daily Schedule section will be blank.
14. Save your work.
15. Re-query to see that the query caused no records to be retrieved.
16. If you need to fill the daily scheudle for the staff member again (after you have closed the appointments), click on the date and the Fill Day button.

Special Note: Staff services that need to be modified should be performed in the Edit Schedule tab. For example, a staff may perform certain services on only one day of the month.

17. Edit the staff member's schedule for that one day by querying up the existing schedule. The time is hard coded and cannot be changed, but the service fields are modifiable.
18. Click in the Service field and make modifications to the service fields for the amount of time necessary with the new service, or N/A.
    - If appointments exist, reschedule the conflicting appointments and continue making the necessary changes.

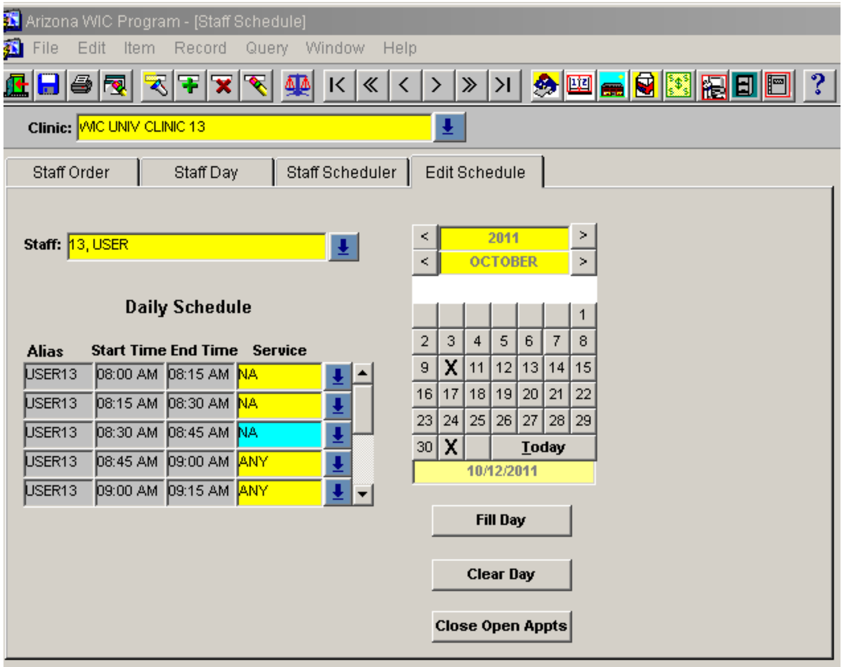


Figure 70 – Staff Scheduler-Edit Daily Schedule

19. Save the changes.
20. Exit back to the Apppointment Scheduler main menu.

DELETING CLASSES

A class may need to be deleted from the appointment sheet from time to time due to being understaffed, overbooked, or just needing to change the class time based on clinic hours of operation. The appointment sheet is the only functionality available for deleting a class. No other appointment scheduler functionality can be modified via the appointment sheet.

1. Click the Appointment Scheduler icon from the Master Menu.
2. Click Scheduling on the Appointment Scheduler main menu.
3. Click Appointments.
4. Click the Appointment Sheet tab.
5. Select the calendar date of the class to be deleted.
6. Click the first slot only of the class to be deleted.
7. Double click on the first slot for the class.

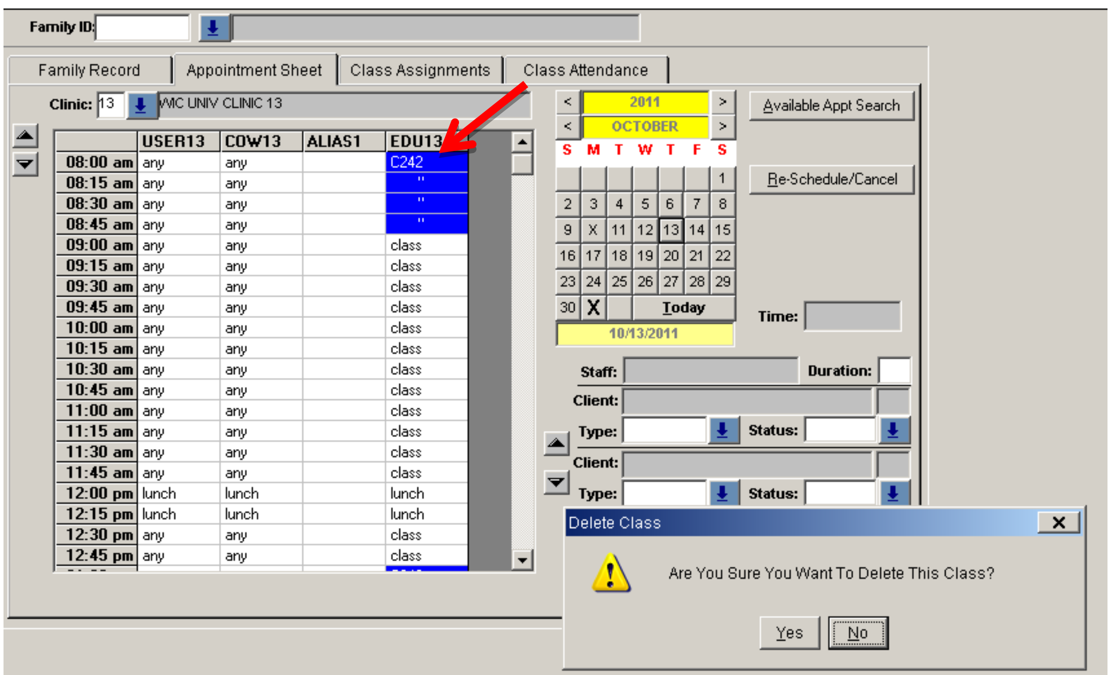


Figure 71 – Staff Scheduler-Edit Daily Schedule

8. The message states "Are you sure you want to delete this class?"
   - The system default is set to "No".
   - The user will have to select "yes" to delete the class from the appointment sheet.
     - If the class does not contain any family participants, then the system will automatically delete the class from the appointment sheet.

       OR

     - Families may already be assigned to the class. The system will alert you that families are scheduled and must be removed in order to delete a class.
       - Click "ok" to the message. Click once to highlight the class id of the class appointment on the appointment sheet.
       - With the class id number highlighted, click the Class Attendance tab.
       - Delete the families from the Class Families list.
       - Save your work.
       - Click the Appointment Sheet tab, and click once to highlight the class id of the class appointment on the appointment sheet.
       - Double click on the first slot for the class.
       - The message states "Are you sure you want to delete this class?"
       - Click Yes and the class is deleted.
       - Save your work.

Tips, Tricks, and Shortcuts:

Here a few suggested ways for daily editing:

Close open appts - this will close available slots, and ask you to remove the interfering appointments so that the slots will fill with NA. (If most of the day is filled with appointments, then just "move" those appointments that interfere with the hours you want to modify. NA will populate those slots that had appointments removed. Replace NA slots that should remain available, with the service to perform.)

Look at appointment sheet, determine what appointments interfere with modifying, and “reschedule" the appointments to other open slots during the same time frame. For partial day editing, go to Edit Schedule and row by row select NA for the time span needed to shorten or expand a staff's day.

Here is a suggested way to edit monthly:

1. In Staff Day, modify the services, save the information, and copy day if necessary. In Staff Schedule publish the new schedule to appropriate months.

- If appointment slots already contain a service, clear for the month, and fill for the month.
- If appointments exist, move appointments, clear for the month, and then fill for the month.

Deleting “empty” classes from the appointment sheet:

The occasion may arise when scheduled classes may not have any participants registered for the class. Deleting the class and reassigning the staff services in Edit Schedule will open up available appointment slots for a particular day.

A user is not capable of deleting a class from the appointment sheet unless the user is assigned the AS_CLNDR_BLDR role. If the user attempts to delete the class, a message appears to the user, "you do not have the proper role to delete classes. Please contact your supervisor". Therefore the user cannot move the class from the appointment sheet.

If the user **has** the appropriate role to delete a class, a confirmatory message appears - with the default to NO, asking if the true intention is to delete the class. If the user chooses (YES) to delete the class (no scheduled clients), then the class will be removed from the appointment sheet and the class will not appear in the Class Assignments or the Class Attendance tabs. The class is no longer scheduled for the particular day. To re-publish the class, the user with the calendar builder role will need to return to SETUP - CLASSES - Schedule Class Day and select the date for teaching the class and publish it.

If the user chooses to delete a class with scheduled clients in the class, then the user must reschedule/delete the clients from that class before the class can be deleted from the appointment sheet.

A user is not capable of rescheduling a CLASS using the Reschedule/Cancel/Delete button functionality. The class will always return to its original state on the appointment sheet even if the attempt is saved and the screen is refreshed.

If classes are modified and re-published over an existing class on the appointment sheet, the user will receive a message on Schedule Class Day, "One or more classes are scheduled between the existing times for the date. Please delete the class first or select another day to schedule the class."

The user cannot schedule a family into a class from the appointment sheet. The user must use the class assignments screen to schedule the family into the class.

If a class is unintentionally deleted there is no method to get it back. The only way to prevent the loss is to run a report from the Group Ed/Class Summary report identifying each class.

Section 5: Making Appointments

Section Concepts:

To schedule a family appointment, a Family ID or Authorized Representative name is mandatory. To obtain this information, the starting point is the Family Record. The Family Record displays certification and appointment statuses for the family unit based on each client. In addition, you will view the Appointment History for each member of the family. The Family Record window will also be the end point after scheduling a family appointment. The client(s) are instructed on the Things to Bring to the appointment, and given an Appointment Notice for next scheduled family appointment. Classes will be assigned to those families that will attend classes. Once the class has occurred, you will issue food instruments to the families that attended the class.

Step-by-Step Instructions:

1. Click the Appointment Scheduler icon from the Master Menu.
2. Click Scheduling on the Appointment Scheduler main menu.

Figure 72 - Appt. Scheduler Main Menu

3. Click Appointments.

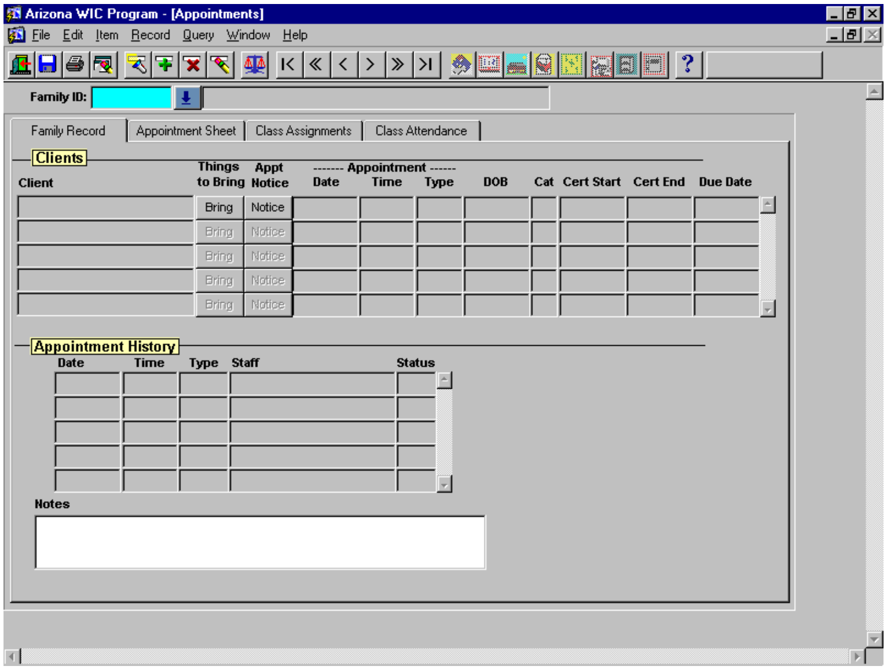


Figure 73 - Appointments screen – Family Record Tab

- You are now in the Family Record window.
- The Family Record screen is where the AIM User can view a family's appointment history based on each member of the family. Participant statistics are in a Display Only mode for convenience to the AIM User.

4. Select the Family ID for the family you want to schedule an appointment by either of the two following methods:
5. Double click on the blank Family ID field to "jump" you to the Client/Family Lookup screen, or type in the Family ID.
6. If you jump to the Client/Family Lookup screen, you can search for the family.
   - Once the results appear, double click on the Family ID you want to return to the Family Record screen.
   - The Family ID will auto populate in the Family Record screen.
   - Press the Tab key to display family information.
7. To fill in the Family ID and query the requested family, type the Family ID number in the field and press the Tab key to display family information.
8. Click the Appointment Sheet tab.

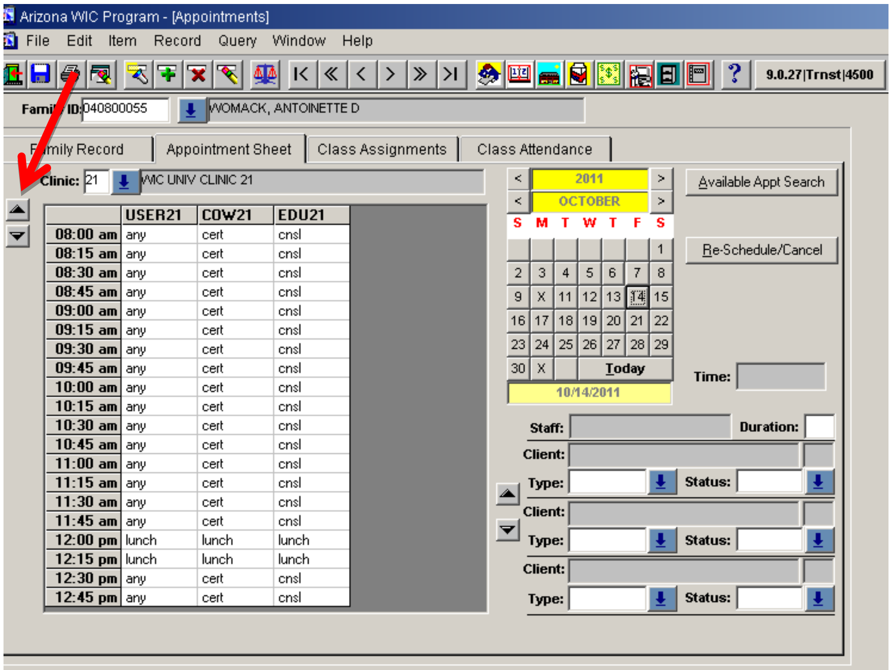


Figure 74 - Appointment Sheet Tab

- The Authorized Representative's name and ID number appear across the top of the screen.
- Mouse over the Family ID or authorized representative's name to view the authorized representative phone number.
- The hours of clinic operation appear in the first column of the grid.
- The clinic staff display in the interior of the grid.
- Each staff is assigned services they can perform within the day.
- The service type "any" indicates that the user can provide the following services: Issue, Nut. Ed, Certifications, Food Plus Certifications, Health Check, Transfers, New.
- The maximum number of staff displayed at a time is five. To view additional staff, use the horizontal scroll bar at the base of the grid.
- Use the large Up and Down arrows to the left of the appointment sheet to view four - hour increments on the appointment sheet.
- To correct a mistake before you save, click on the calendar date to "refresh" the screen.
- When working with the scheduler, work with the first slot only. The System will generate the information necessary for the required appointment.

Example: The System might be programmed to schedule initial certifications for a pre-set time of 30 minutes. The time slots displayed are in 15-minute intervals and one certification appointment would take up two 15-minute time slots. You will keep your cursor in the first time slot of 7:30AM and the System will automatically generate your information into both the 7:30AM and 7:45AM time slots totaling 30 minutes.

9. Search for an appointment using one of the following methods: the calendar or available appointment search.
10. The calendar will not default to today's month and year at the top and today's date at the bottom of the calendar.

    You will need to select the current date manually.

    - To change the month and year, use the forward and backward arrows next to the appropriate item.
    - To change the date, click the date box in the calendar and check to see if the display date has changed to match your selection.
11. The Available Appt. Search button allows you to enter specific, optional criteria to find an appointment and Search.

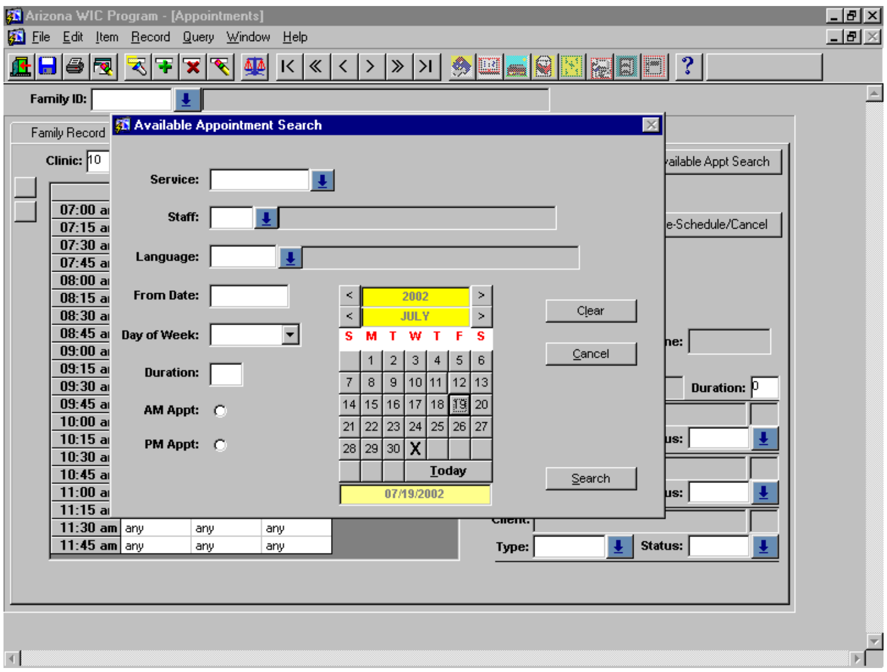


Figure 75 - Appointments screen – Available Appointment Search Pop-up

12. You may be specific or broad in your selection criteria for the Available Appointment Sheet. The system will use the information to find the next available appointment.
13. Click Search to begin the process.
14. Once the system has identified an available appointment slot, it will display the next available appointment in the color "green" on the appointment sheet.
15. Click on the cell, the system will fill in the Family ID as well as the client information in the Family Information section.

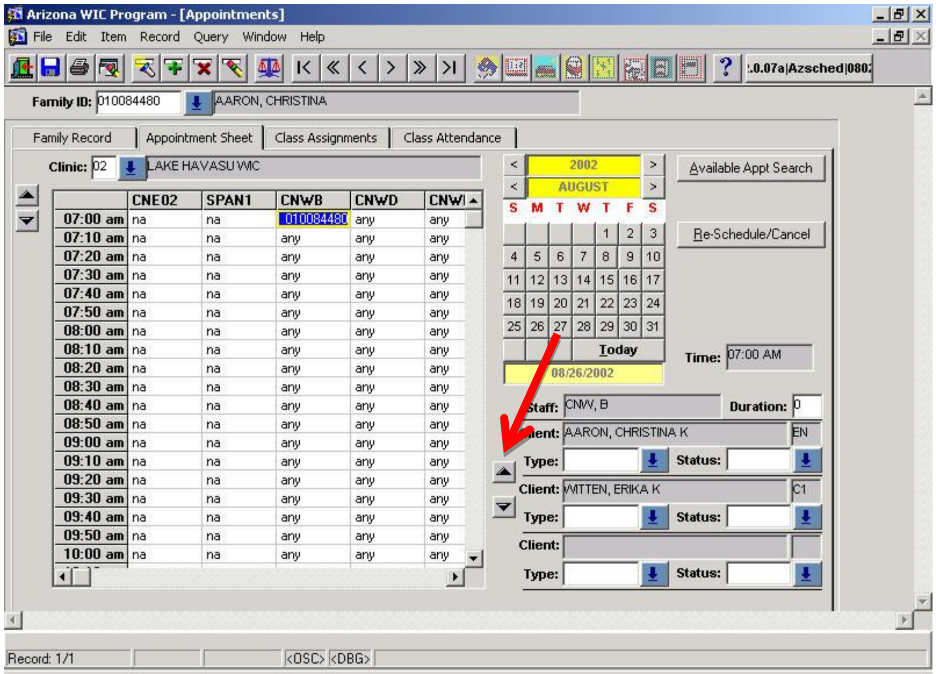


Figure 76 - Appointments screen – Appointment Sheet

- The time selected for the appointment is view only displayed above the Family Information section.
    - ➢ The Staff that will perform the services for the family is displayed in view only also.
    - ➢ The Client's in the family appear in the Client field as well as the category.
    - ➢ The large Up and Down arrows next to the family information are used to see multiple family members in increments of three.

16. Select a service/activity type for each client.
    - Each service/activity has a pre-set time internally programmed into the System, and is displayed in the duration field.
        - ➢ The duration field is modifiable.
        - ➢ Time can be increased or decreased based on the clinic appointment interval.
        - ➢ The duration determines the number of time slots to fill on the appointment sheet.
    - The service that the staff provides must match with the service the client needs.
    - Clients that are <u>not</u> assigned a service/activity type will <u>not</u> be eligible to have nutrition education documented on their record as each client requires a documented appointment type in order to assign nutrition education topics to the client.

Example: A staff assigned Certifications for the day cannot perform a Counseling (CNSL) appointment for a client because the services do not match. However, if a staff is assigned "Any" service type then several of the services will match, as mentioned previously.

17. The system will default the status to (P) pending for future appointments.
    - The status field will display Walk-In for appointments scheduled on the current date for families that arrive to be seen without a scheduled appointment.
18. The appointment slots will fill for the duration selected for the family appointment with the family id of the authorized representative.
19. Click Save to keep the appointment.
20. Click the Family Record tab to return to the screen to confirm the family appointment.
    - If multiple appointments exist for the family, i.e. a certification appointment and a class, the earliest calendar date appointment will appear first. Once the appointment expires, the next appointment appears in the family record screen.
21. Click the Things to Bring button.
22. Select the items that the client should bring to the appointment by selecting an item and clicking the right arrow. key or double-clicking the item to bring.
    - Items to Bring are client specific within the family.
    - You will be prompted to save after each client is assigned Items to Bring.
23. Click the Appointment Notice button.
24. Select the appropriate appointment notice radio button
    - Click OK to automatically print the designated notice, or Cancel to exit from the Appointment Notices screen.
    - Notices print in both Spanish and English.
25. Click Save.

Let's take some time to learn the process of rescheduling and deleting appointments.

1. Click Scheduling on the Appointment Scheduler main menu.
2. Click Appointments.
    - You are now in the Family Record window
3. Select the Family ID for the family you want to schedule an appointment by either of the two following methods:
    - Double click on the blank Family ID field to "jump" you to the Client/Family Lookup screen. Fill in the necessary criteria to Query the requested family. Once the Results appear, double click on the Family ID to return the Family ID to the Family Record screen and tab.

      OR
    - Enter the Family ID number in the field and Tab for the family information.

4. Click the Appointment Sheet tab.
5. Click in the first cell of the Appointment to be rescheduled.
6. Click on the Re-Schedule/Cancel button.

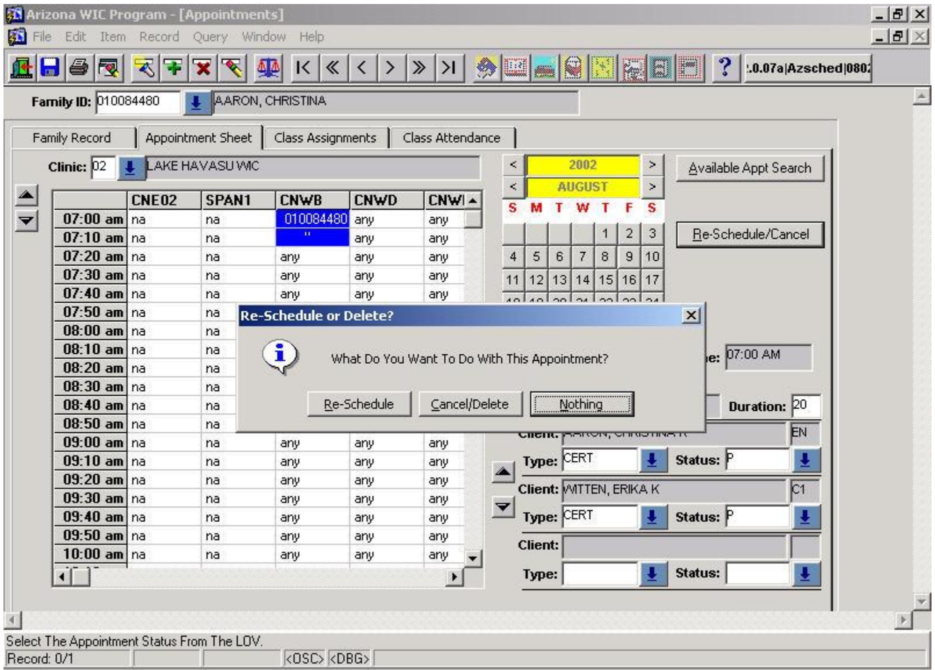


Figure 77 - Appointments screen – Reschedule or Delete Pop-up

7. Choose from the following options:
    a. Re-Schedule
    b. Cancel/Delete
    c. Nothing
8. Click on Re-Schedule.
9. Select one of the two options;
    a. A new calendar date for the appointment, or
    b. A new time slot in the current day
10. Click on a new calendar date from the calendar.
11. Select a new time slot for the rescheduled appointment.
12. The information is moved into the time slot.
13. Click Save.
14. Return to the Family Record screen to print a Reschedule Notice for this family appointment change.
15. Exit back to the Appointment Scheduler main menu.

CREATING A PLACEHOLDER IN THE APPOINTMENT SCHEDULER

To hold an appointment for a client who is going to transfer in, each clinic can create a placeholder. This will alleviate the need for multiple transfers of a family record.   You should keep in mind the following guidelines when creating a placeholder family:

1. Only the person responsible for building the appointment scheduler should create the placeholder client.
2. Only one placeholder per clinic is allowed.
3. Use the naming standards in creating the placeholder: (Family Last Name = LAXX PLACEHOLDER, First Name = Clinic number for your clinic).
4. The WIC Director or designee such as nutritionist or clinic supervisor is responsible for monitoring to ensure that this policy is followed appropriately.

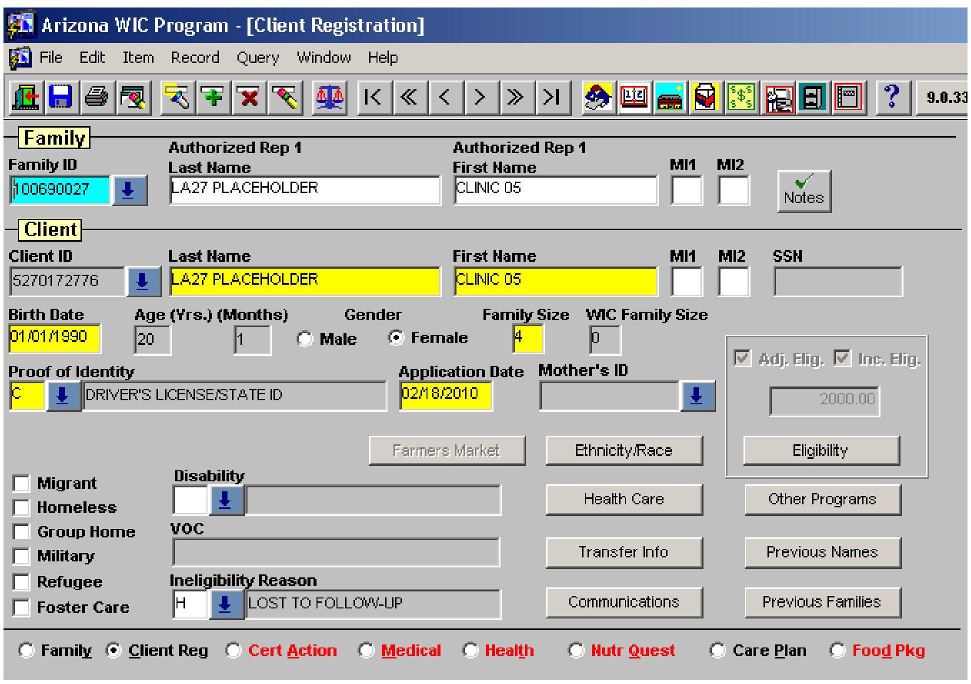


Figure 78 – Client Reg Screen

Step-by-Step Instructions:

1. To create a place holder family record, begin in the Family screen. The name should be as follows: Family Last Name = LAXX PLACEHOLDER, First Name = Clinic number for your clinic (Clinic 05, Clinic 02 etc.) Do not create a Pre-certified family record as it will drop off if there is no activity within 90 days.
2. In order to schedule an appointment you must have at least one family member. Certify one person in this family, but only up to the Cert Action screen.
3. To prevent Duplicate Records – Use a different Birth Date in each clinic (i.e. 01/01/1990 for Clinic 01; 02/02/1990 for Clinic 02, etc.). Ethnicity/Race and Income can be at user discretion.

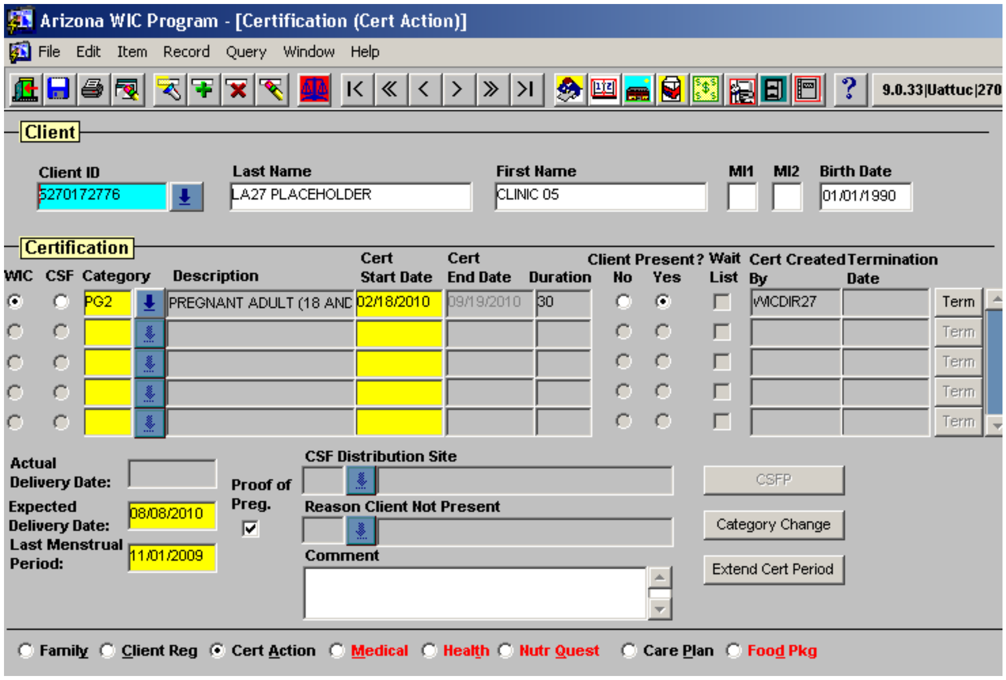


Figure 79 – Cert Action Screen

4. Terminate the client record after End of Day has run. Appointments can be made using Inactive records.
5. The new PLACEHOLDER family can be used multiple times in a day/week/month to hold appointment slots. You can schedule an appointment for the Placeholder family and extend the duration to accommodate the existing client/family you are holding the appointment slot(s) for.
6. Each time you want to use this place holder, enter the Family ID number and query the family. Click in an appointment slot and you will get a message "This Family Has An Already Scheduled Appointment on MM/DD/2010 at HH:MM am/pm. What Would You Like To Do With The Appointment?" The choices are: Keep, Delete and Cancel.
    a. Select 'Keep' and the existing appointment will be kept. You can then select another time slot and schedule another appointment for the LAXX Placeholder family. Selecting 'Delete' will erase other placeholder appointments.

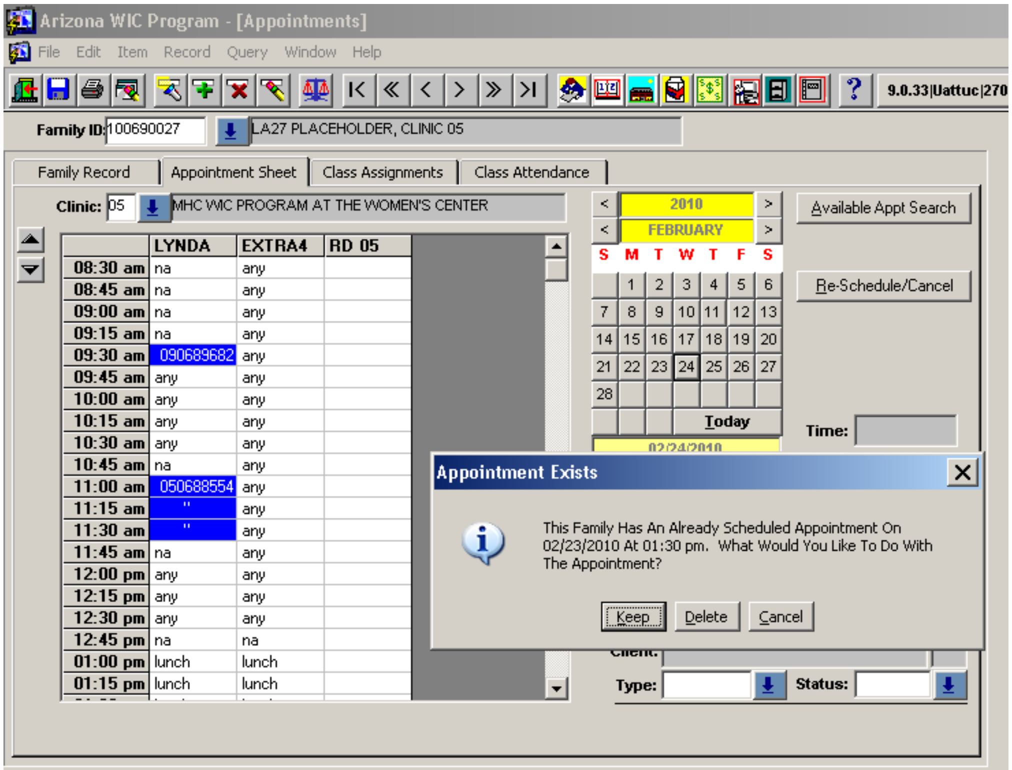


Figure 80 – Appointment Exists Pop-up

7. The LAXX Placeholder family is being scheduled for an appointment on 02/24/2010 at 10:00. The Duration is 30 minutes.
8. The duration can be extended by entering the number of minutes that you want, for the family you are holding this time slot for.

Special Note: Users must tab off of the duration field in order to save the appropriate number of time slots on the appointment sheet.

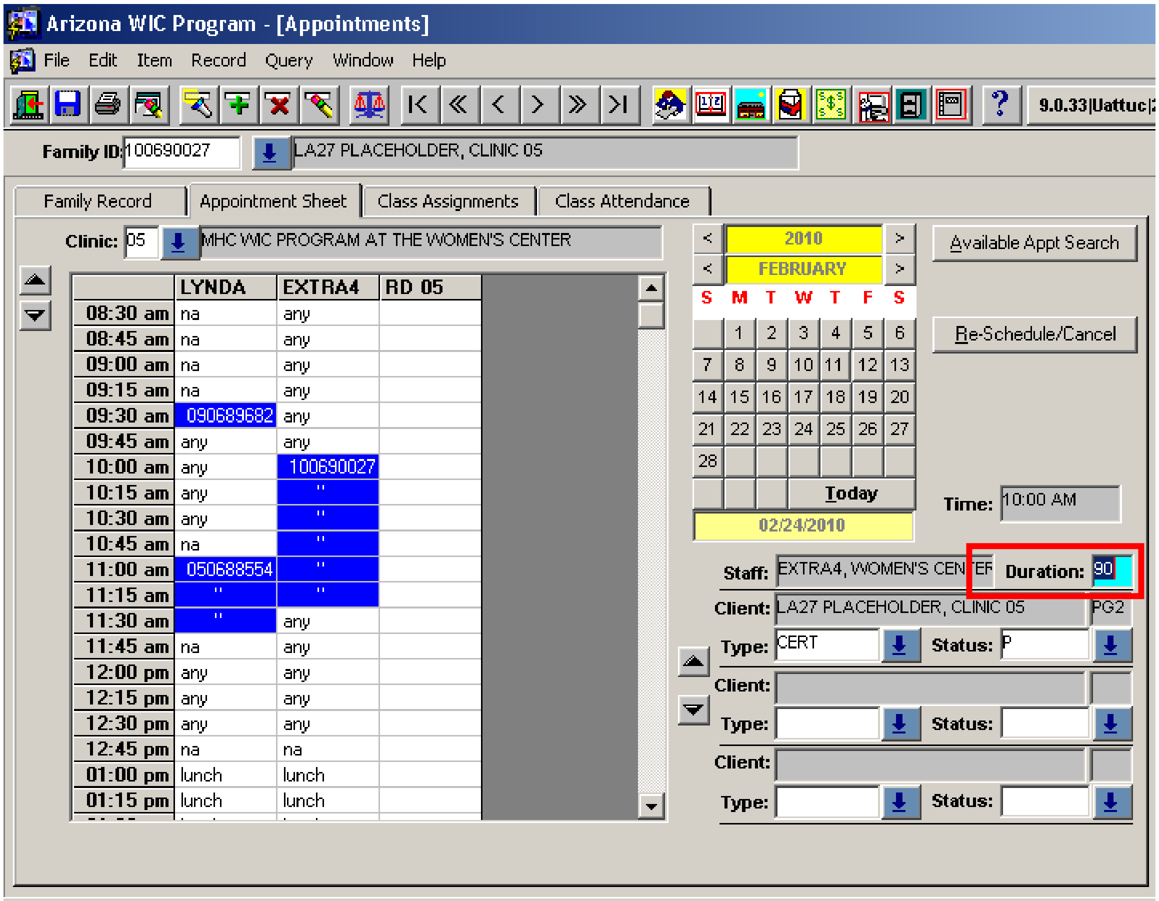


Figure 81 – Duration

9. When the family record (that this placeholder appointment was created for) is transferred into the clinic, an appointment can be made for them in this time slot by clicking on the Family ID number of the LAxx Placeholder family, clicking on the Re-Schedule/Cancel button and deleting the existing appointment. Save the screen. Query the family that this time slot was held for, click in the appropriate time slot and schedule the appointment. Save the screen. Deleting this LAXX Placeholder family appointment will not affect any other appointments that are scheduled for the LAXX Placeholder family.

Tips, Tricks, and Shortcuts:

- Double clicking the desired item in the LOV will populate the field and close the LOV.
- The appointment length of time can be reduced by clicking in the duration field and manually decreasing the duration from the family appointment field. This process reduces time for the family appointment, yet does not affect an individual client.
- Selected Appointment: If there are not enough appointment time slots available for the System to book a particular service, one of two warning messages will appear:
  - *"The clinic is not open long enough to schedule an appointment of this duration. Please select another time."*
  - *"This Staff Member is not scheduled to perform this service during one or more of the required appointment slots. Please select another time."*
- Click OK to acknowledge that you have read the warning.

Special Note: If the user has the override appointments roles, the System will then overbook that time slot with the appointment

CLASS ASSIGNMENTS TAB

The class assignments information is assigned to a family in the Appointment Sheet. It is important to capture the setup and assignment of classes together.

1. Click the Appointment Scheduler icon from the Master Menu.
2. Click Scheduling on the Appointment Scheduler main menu.
3. Click Appointments.
4. Click on the Class Assignements Tab.
5. Enter the appropriate “From” date information and/or Class Category search criteria in the field at the top of the screen.

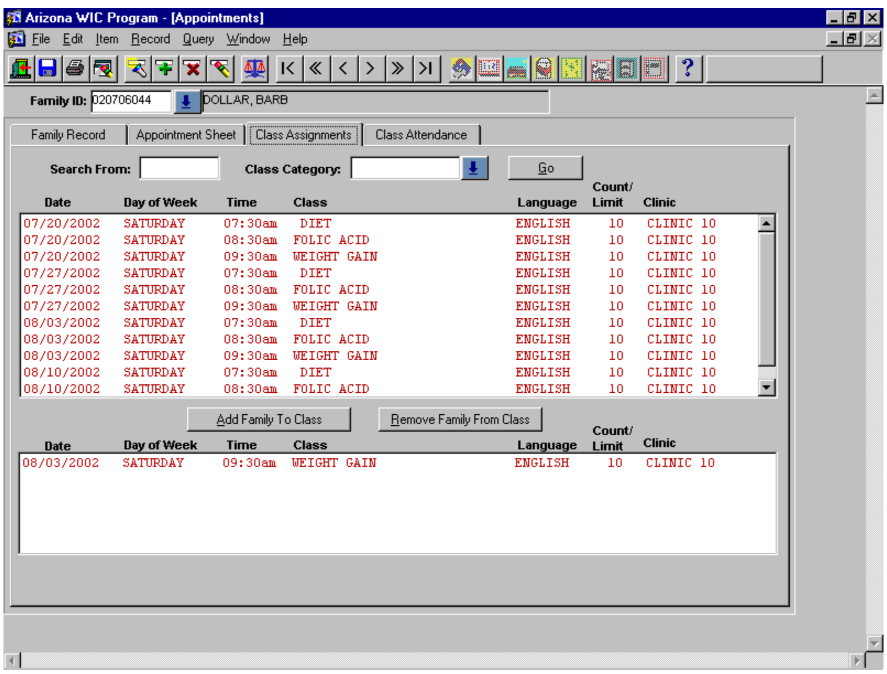


Figure 82 - Appointments screen – Class Assignments Tab

6. Click the GO button.
7. Select the available class(es) to schedule the family to.
8. Click the Add Family to Class button.
9. Click Save.
10. Click the Family Record tab.
11. Exit back to the Appointment Scheduler main menu.

Tips, Tricks, and Shortcuts:

- Once the class has reached the “class limit” that class will no longer be available, or viewed, in the Class Assignments screen.
- If a family cancels their class appointment for a class that met the class limit, that appointment slot becomes available, and the class assignment search will display the available class.

CLASS ATTENDANCE TAB

This is the screen used to document class attendance and issue food instruments to the participants. You will access this screen when the client comes in to your clinic for the class on the day it is offered using the following method.

1. Click the Appointment Scheduler icon from the Master Menu.
2. Click Scheduling on the Appointment Scheduler main menu.
3. Click Appointments.
4. Click the Appointment Sheet tab.
5. Locate the staff member that is the class educator.
6. Click on the first cell of the class number for the first class that day.

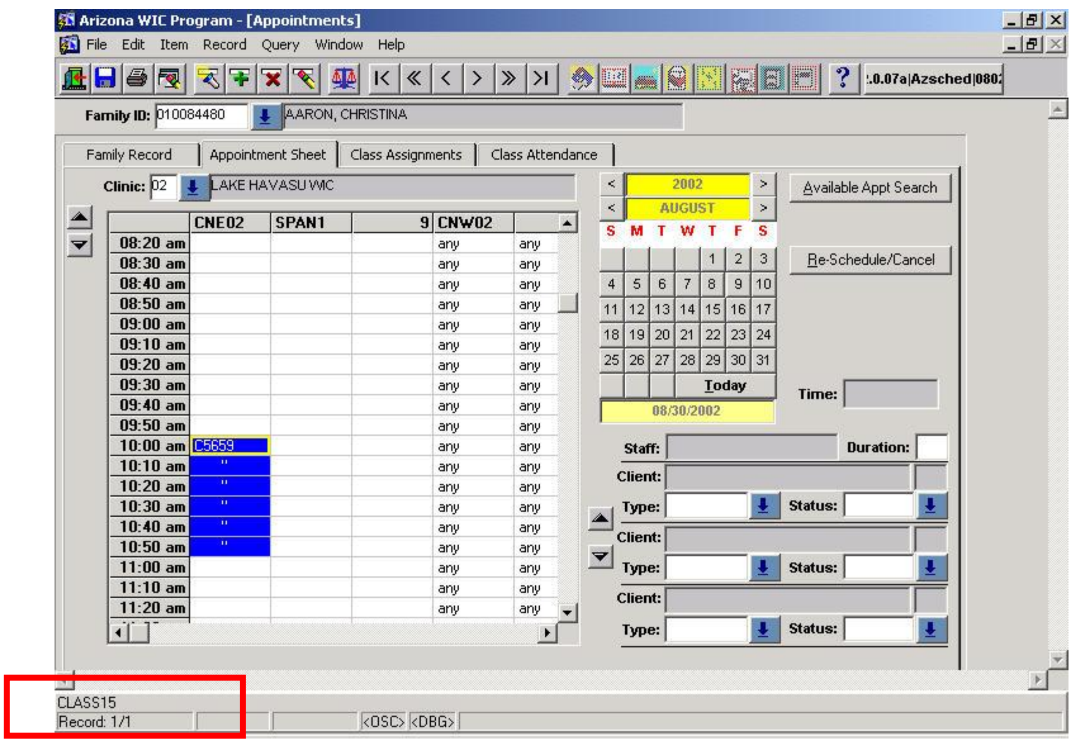


Figure 83 - Appointments screen – Appointment Sheet Tab

7. The class name appears in the hint text.
8. Now, click the Class Attendance tab.

***Special Note:* This window opens in a query mode.**

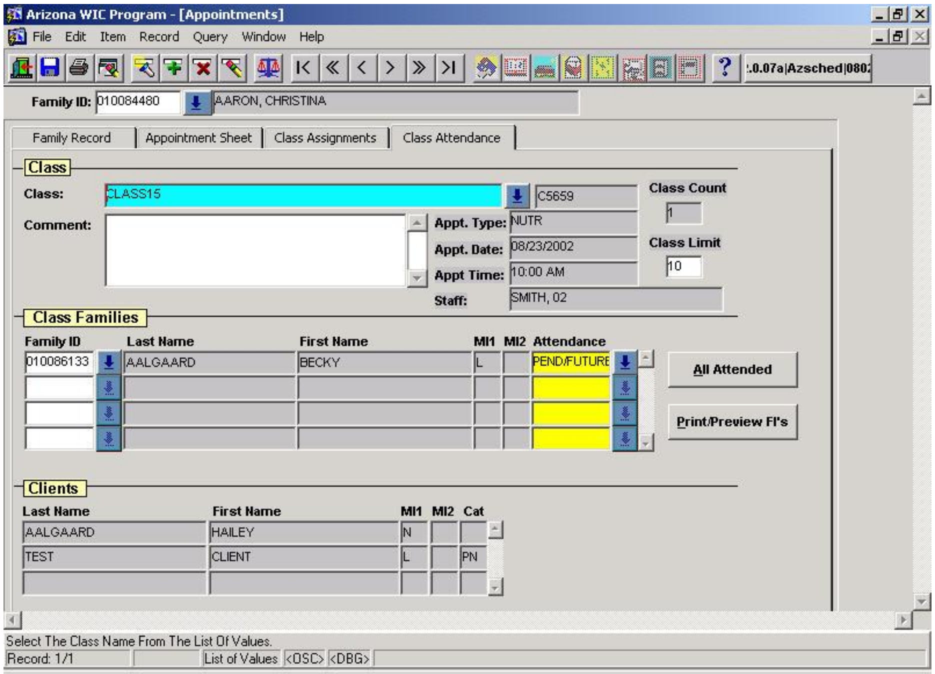


Figure 84 - Appointments screen – Class Attendance Tab

9. The class attendance tab populates with the class offered at that time slot.
   - The system will display the families and corresponding family members enrolled in that class.
   - Class details populate the screen.
10. Click the All Attended button to mark a family as attending a class.
    - The All Attended button is used to group the participants and manually mark the attendance as all attended.
11. Click the Print/Preview FI's button.
    - The Print/Preview FI's button is used to jump to the Class Food Instruments screen to see FI's related to the family record and to group print the FI's for the members of the class.
12. Click Print for Food Instruments.
13. Save your work and acknowledge the transaction.

To add a family to the class:

Special Note: **This window opens in a query mode.**

1. Click the Class Name LOV and select the Class you want to view.
2. Enter the family ID for the family you want to add to that class and Tab.
3. Save your work and acknowledge the transaction.

To view the clients in the family in the Class Attendance Tab:

1. Click in the Family ID field to view the clients within that family in the fields below.
2. Exit this window.

LABEL PRINTING

Mailing labels can also be printed, using the correct mailing labels, to contact participants regarding their appointment history.

To produce labels:

1. Click the Appointment Scheduler icon on the Master Menu.
2. Click Outputs on the Appointment Scheduler main menu.
3. Click Labels, then click Appointment Mailing Labels.

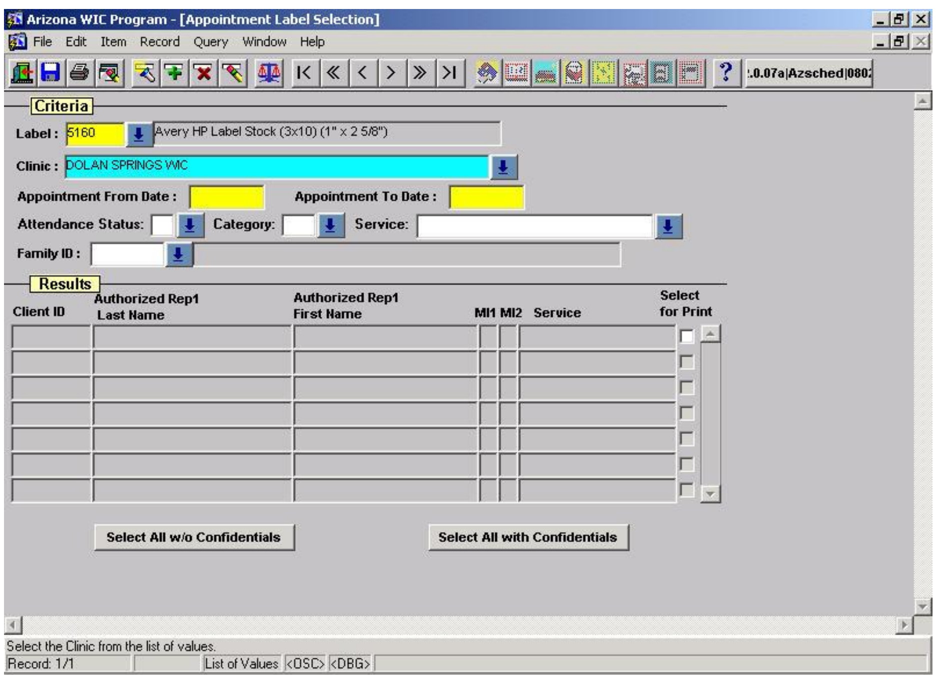


Figure 85 - Appointment Label Selection parameter screen

Enter the Mandatory fields:

4. Select the correct mailing label from the Label LOV.
5. Select the clinic from the LOV.
6. Enter the appointment date range.

***Special Note: These fields are optional, but will narrow the search if necessary*.**

7. Selelct the Attendance Status from the LOV.
8. Select the Category from the LOV.
9. Select the Service from the LOV.
10. Enter the family ID.
    - Type in the family ID, or
    - Double click in the family ID field to return to the Client/Family Lookup screen and query for the family ID.
11. Click Query for the results.
12. Select one of the three methods for printing labels:
    - The system will return results from which you can individually choose the participants to print labels for.
    - Click the Select All w/o Confidentials button to select all participant labels to print except for those with a confidentiality flag checked in the Certification section.
    - Click the Select All with Confidentials button to select all participant labels to print except for those without a confidentiality flag checked in the Certification section.
13. Click the Print icon.
14. Choose which label selection you wish to start.
15. Acknowledge the label messages.
16. Preview the label setting.
17. Click the print icon.
18. Exit back to the Appointment Scheduler main menu.

Chapter 5: Food Instrument Processes

Chapter Preview:

This chapter describes how to use the miscellaneous Food Instrument (FI) functions of the AIM System. The AIM System maintains several areas of voiding food instruments, beginning with the actual voiding of food instruments, formula replacement, to the unvoiding of food instruments. The AIM System will also automatically maintain FI number levels. However, a clinic may view their own levels and issue FI numbers manually in emergency situations.

Chapter Objectives:

Upon completion of this chapter, you will be able to:

- Void food instruments.
- Un-void food instruments.
- Complete a formula replacement.
- View and issue FI numbers.

Section 1: FI Number Issuance

Section Concepts:

This section describes how to use the Issue FI Numbers window. The window is used primarily to view the status of FI number levels within a clinic. The AIM System automatically replenishes FI numbers when the total remaining issued numbers is at or below 10% of the number defined by the State for a clinic. This window also allows for FI numbers to be manually issued to a clinic in cases where they are unable wait for the automatic process to occur.

Step-by-Step Instructions:

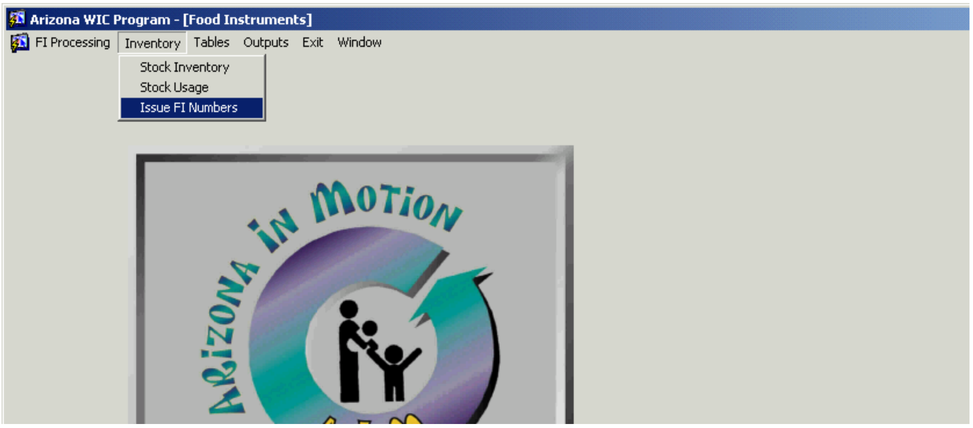


Figure 86 - Issue FI Numbers Navigation

1. Select Inventory from the FI Instruments menu bar.
2. Select Issue FI Numbers from the drop down menu. The Issue FI Numbers window is displayed.

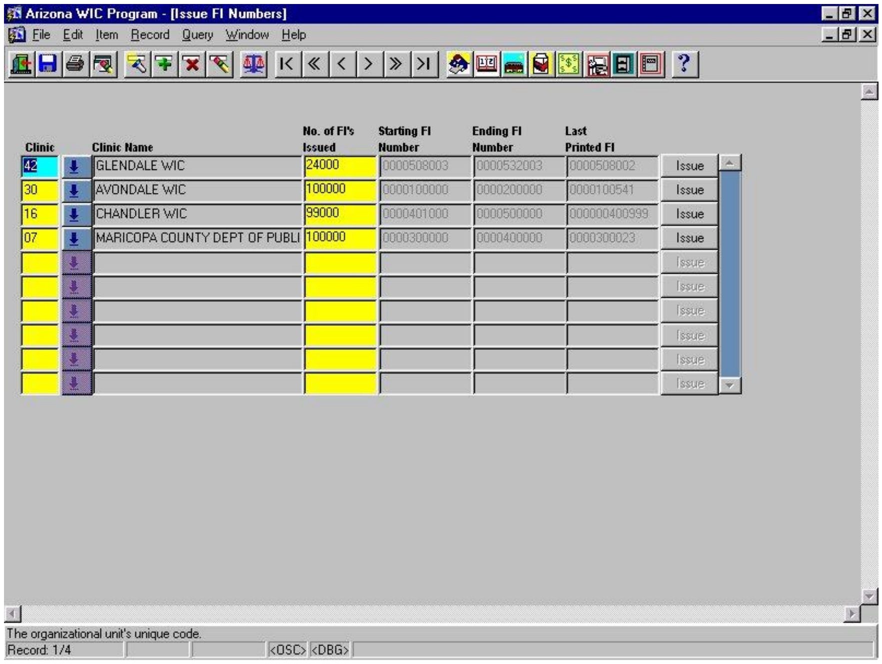


Figure 87 - Issue FI Numbers

3. A clinic may view the following fields:
   - Clinic/Clinic Name-Displays the clinic code/name and must be selected from the LOV when manually issuing FI numbers.
   - No. of FIs Issued- Displays the number of FI numbers automatically issued or the clinic must enter in the number when manually issuing.
   - Starting FI Number- System generated.
   - Ending FI Number- System generated.
   - Last Printed FI-The last FI that has been printed by the clinic. By comparing this to the Ending FI number a clinic can estimate how many FI are remaining.
4. The Issue push button is only used when manually issuing FI numbers.
   - The Clinic code and No, of FIs Issued must be completed before the button may be selected.
   - Once the push button is selected the System will generate the Starting FI Number and Ending FI number.
5. Exit the window.
   - If FI numbers have been manually issued you must save your work.

Section 2: Voiding FIs

Section Concepts:

Occasionally even with On Demand Printing you will need to void FIs. Perhaps the participant has had a change in formula and did not use the FIs or the FIs did not get used for another reason and are returned to the clinic. With the AIM System, you will be able to void the FIs immediately.

Step-by-Step Instructions:

VOIDING ISSUED FIS

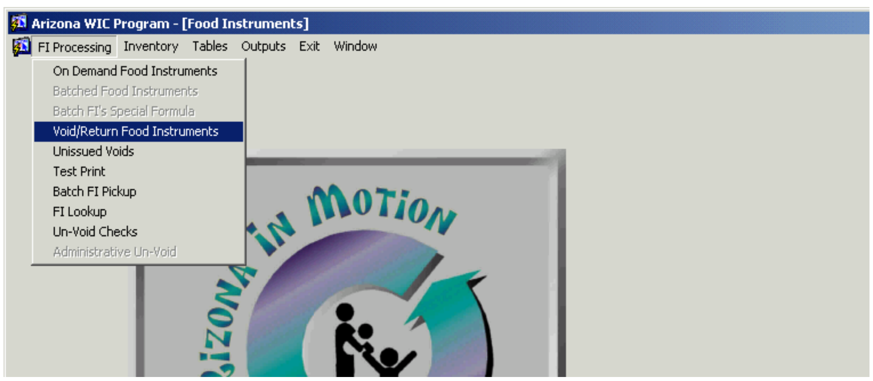


Figure 88 - Void Food Instruments Navigation

1. From the Food Instrument window select FI Processing from the menu bar.
2. Select Void/Return Food Instruments from the drop down menu. The Void/Return Food Instrument window is displayed.

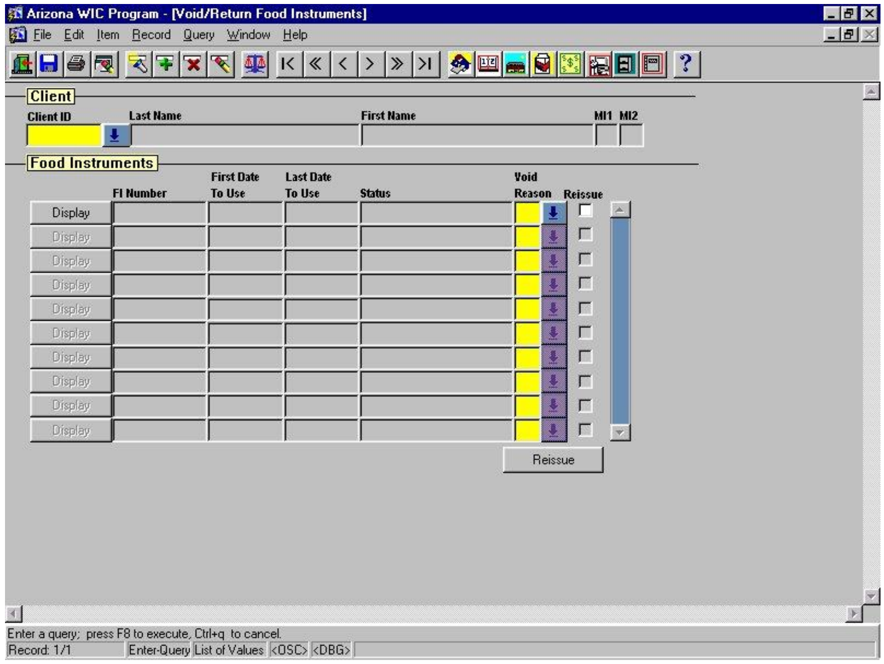


Figure 89 - Void FIs Window

3. The Client ID field is completed with the ID of the participant whose FIs you need to void by using one of the methods reviewed earlier.
4. Execute the query. The Food Instrument section displays the list of all FIs issued.

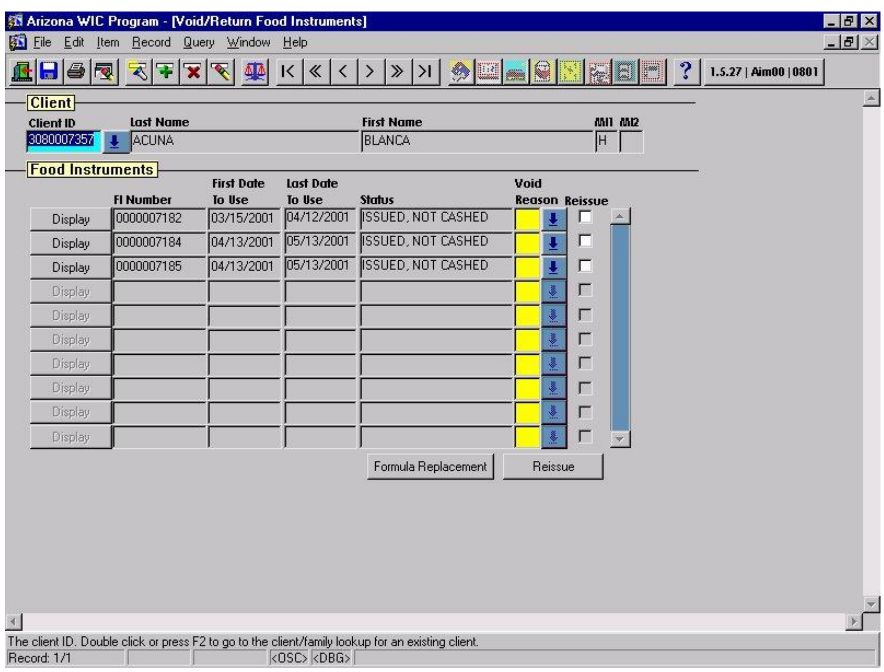


Figure 90 - Populated FI Section

5. Click the Display push button. A copy of the FI is displayed. Click OK to close the pop-up.

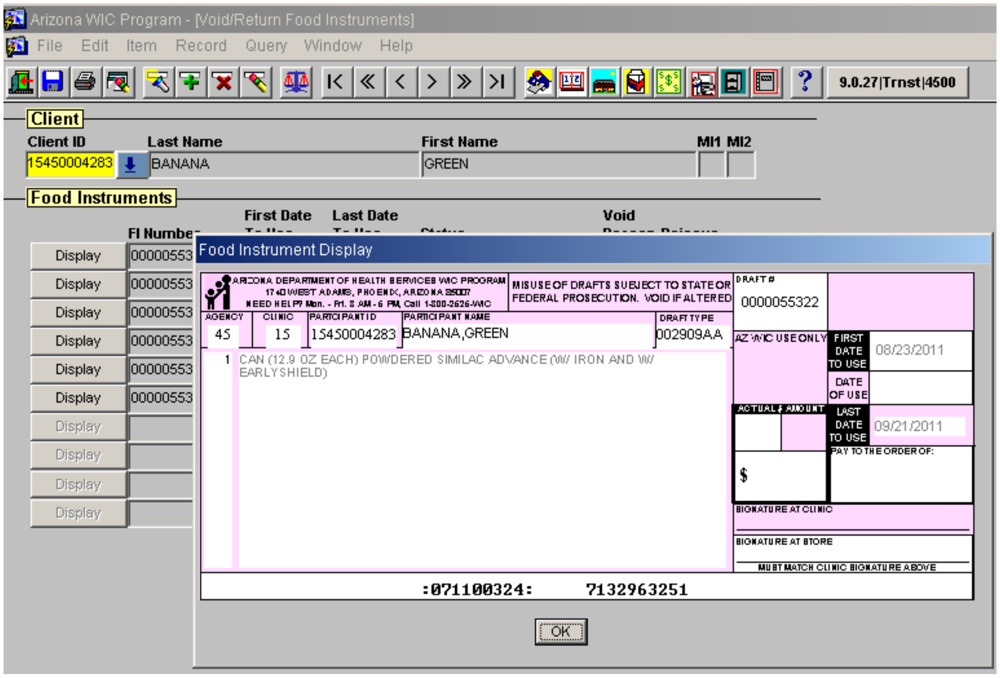


Figure 91 – Food Instrument Display

6. To void the FI click the LOV next to the Void Reason field. The LOV window will display a list of Void reasons and their codes.
7. The Reissue check box automatically marks the FI for reissuance when the Void reason allows reissuance. The original FI is voided and a replacement FI is produced.
   - The Reissue box should only be checked if you want the same FI type produced.
   - <u>Do Not</u> check Reissue if a food package change is needed.
8. Click the Reissue push button at the bottom of the window to print a replacement food instrument.
9. Exit this window.

Section 3: Un-Voiding FIs

Section Concepts:

This section describes how a clinic can un-void mistakenly voided food instruments on the day the void occurred. Staff with the appropriate role may perform the un-void. Those who have the following role assigned can only perform this function: Nutritionist_1.

If the voided food instrument in need of un-voiding occurs after the initial date they were voided, it is required for the State Program Integrity team to complete the un-void. It is called an Administrative Un-void.

The AIM Help Desk cannot un-void any food instruments.

Step-by-Step Instructions:

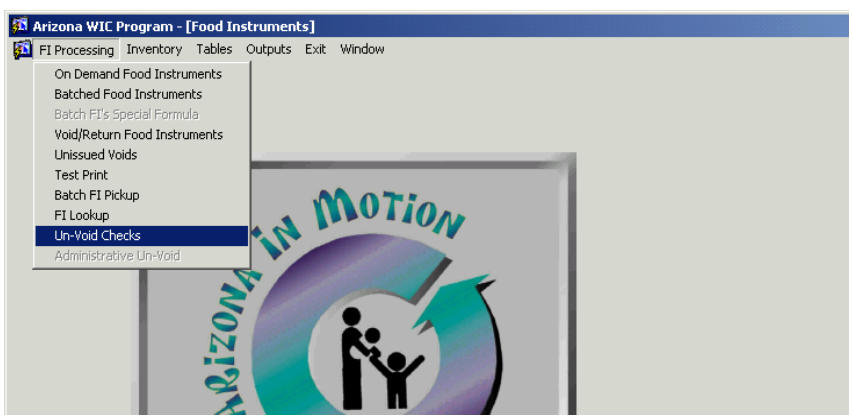


Figure 92 – Un-void Checks Navigation

1. Select FI Processing on the Food Instrument main menu.
2. Select Un-Void Checks from the drop down menu. The Un-Void Checks screen is displayed.

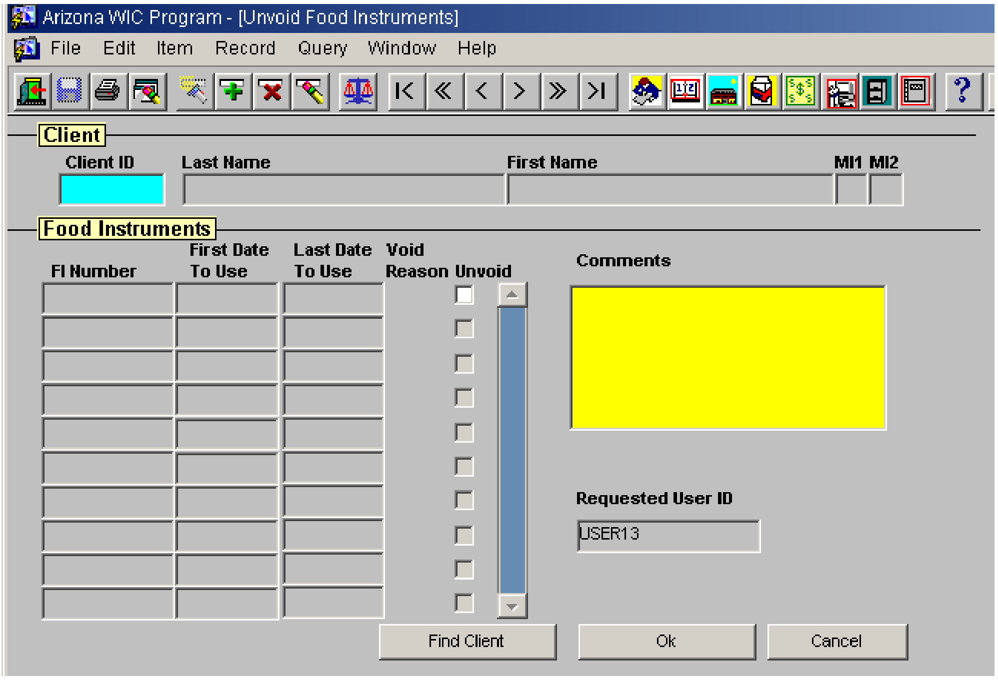


Figure 93 – Un-void Food Instruments

3. Place the cursor in the Client ID field, enter the ID number for the client you wish to un-void food instruments that were incorrectly voided on the current date.
4. Select the Find Client push button to return the client's name and voided food instrument serial numbers.
5. Next, determine which voided food instruments need to be un-voided.
6. Click in the Un-void checkbox for the food instrument(s) to be un-voided.
7. Using the free form text Comments box, enter the reason for proceeding with an un-void using the free form text Comments box.
8. Select the Requestor Name from the list of values. This field allows the entry of the Local Agency staff requesting the un-void.
9. Click the OK button to continue with the transaction.
   - The Cancel button will cancel the transaction.
10. Lastly, click OK to acknowledge the Transaction Completed.

Section 4: Formula Replacement

Section Concepts:

There are times when an infant's formula changes after FIs have been issued and cashed. If not all FIs for the month have been cashed you may do a formula replacement for the FIs still in the participant's possession. Before we learn how to replace the FI(s) it is important we understand some basic business rules.

1. If the authorized representative has not cashed any of the FIs for the month, you may disable or delete the food package, void the FIs and reissue the entire food package, a formula replacement is not needed.
2. If the authorized rep. has cashed some but not all of the FIs the following conditions must be present:
   - The initial food package must contain 2 or more "formula" FIs.
   - The participant must have at least one un-cashed FI in their possession.
   - A new food package for formula must be selected.
3. FIs cannot be replaced for food packages that do not contain formula.
4. FIs cannot be replaced if all formula FIs in the food package have been cashed.
5. An FI cannot be replaced if the First Date to Use of the FI you are replacing is earlier than the Effective Date of the new food package.

Step-by-Step Instruction:

1. Log on to AIM.
2. Click on the Enrollment & Certification Module.
3. Click Certification Info drop down on the Enrollment & Certification menu.
4. Click Nutrition Eligibility and then select Food Package.
5. Enter Client ID and run query. Client information is displayed.
6. Tab to Food Packages section and check the Disable box to disable the food package you want to replace.
7. Assign the new food package making sure that the effective and end dates of the new food package and the effective and end dates of the old food package are the same.
8. Save your changes.
9. A message is displayed:
   - "*You will need to void the returned FI's prior to issuing a new package, would you like to go to the void FI screen now?   Yes   No*"
10. Select Yes.

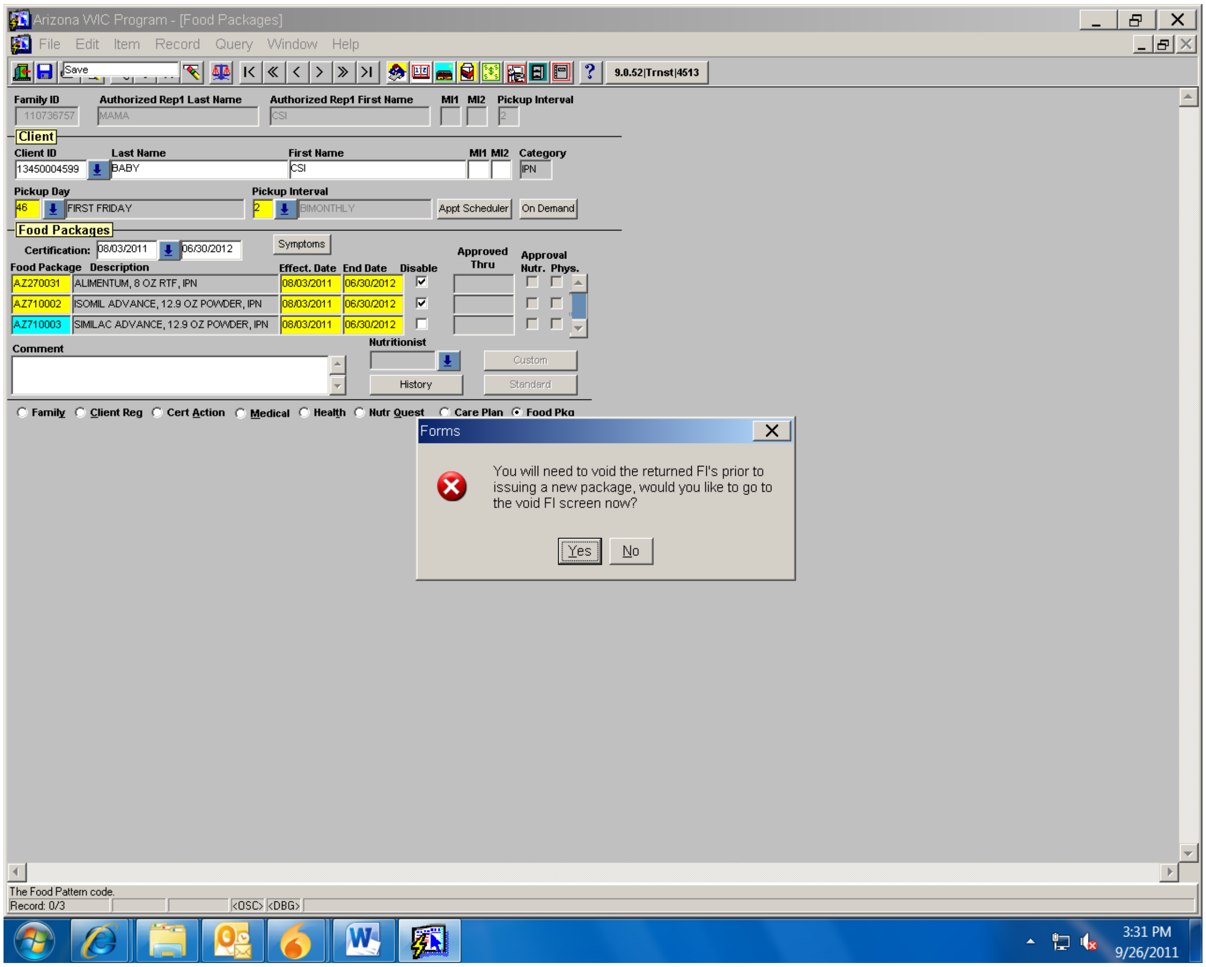


Figure 94 - Existing Food Instrument Message

11. This will automatically take you to the Void/Return Screen.
12. Use the Display button to view the FIs and determine which FI you want to replace.
13 Press the Formula Replacement button.
14 The Formula Replacement screen is displayed with all potential FIs for replacement displayed.

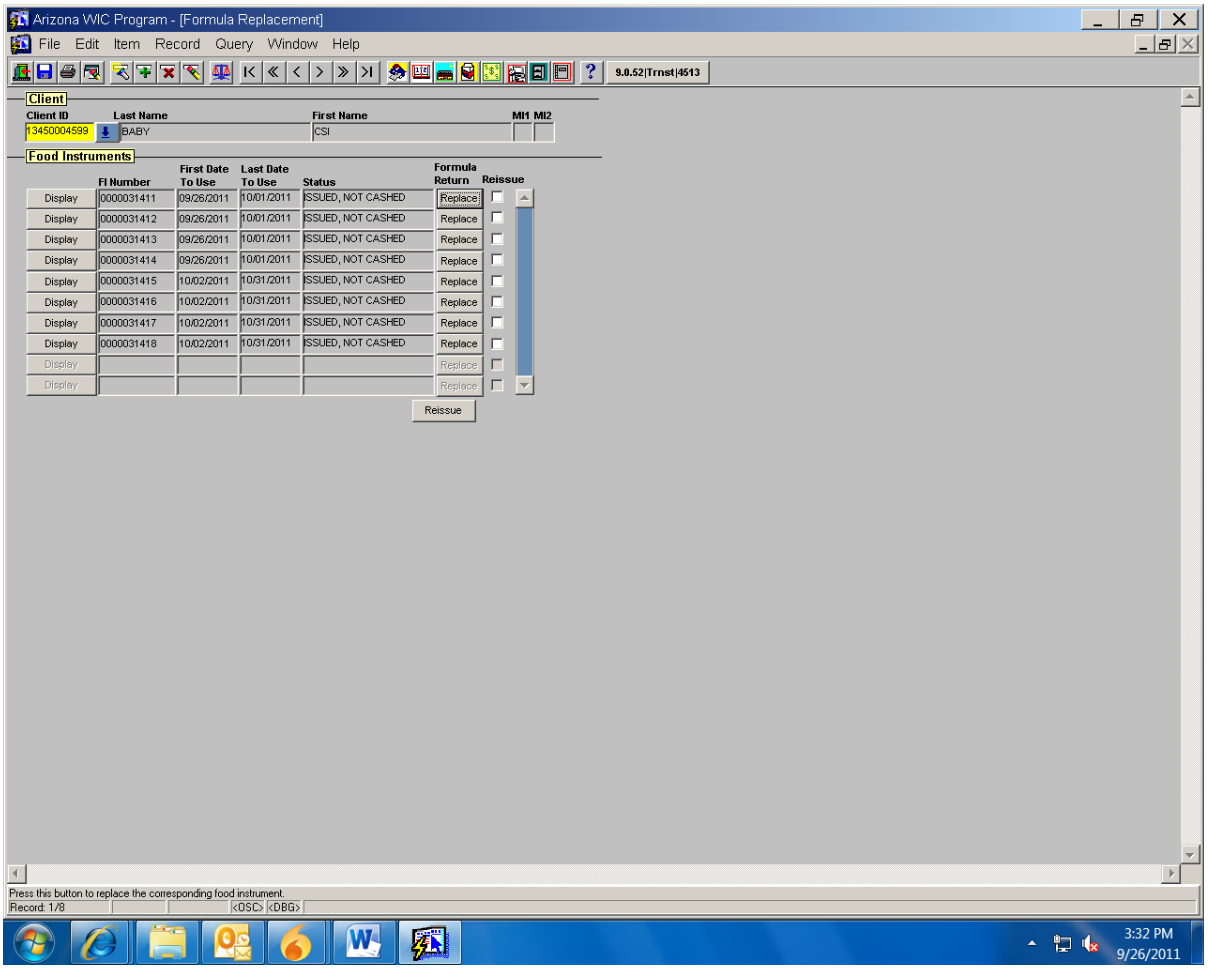


Figure 95 - Formula Replacement Screen

15. You may again use the Display button to identify the FI you want to replace.
16. Click the Replace button next to the FI you wish to replace.
17. The Select Food Package FI Type pop-up is displayed.

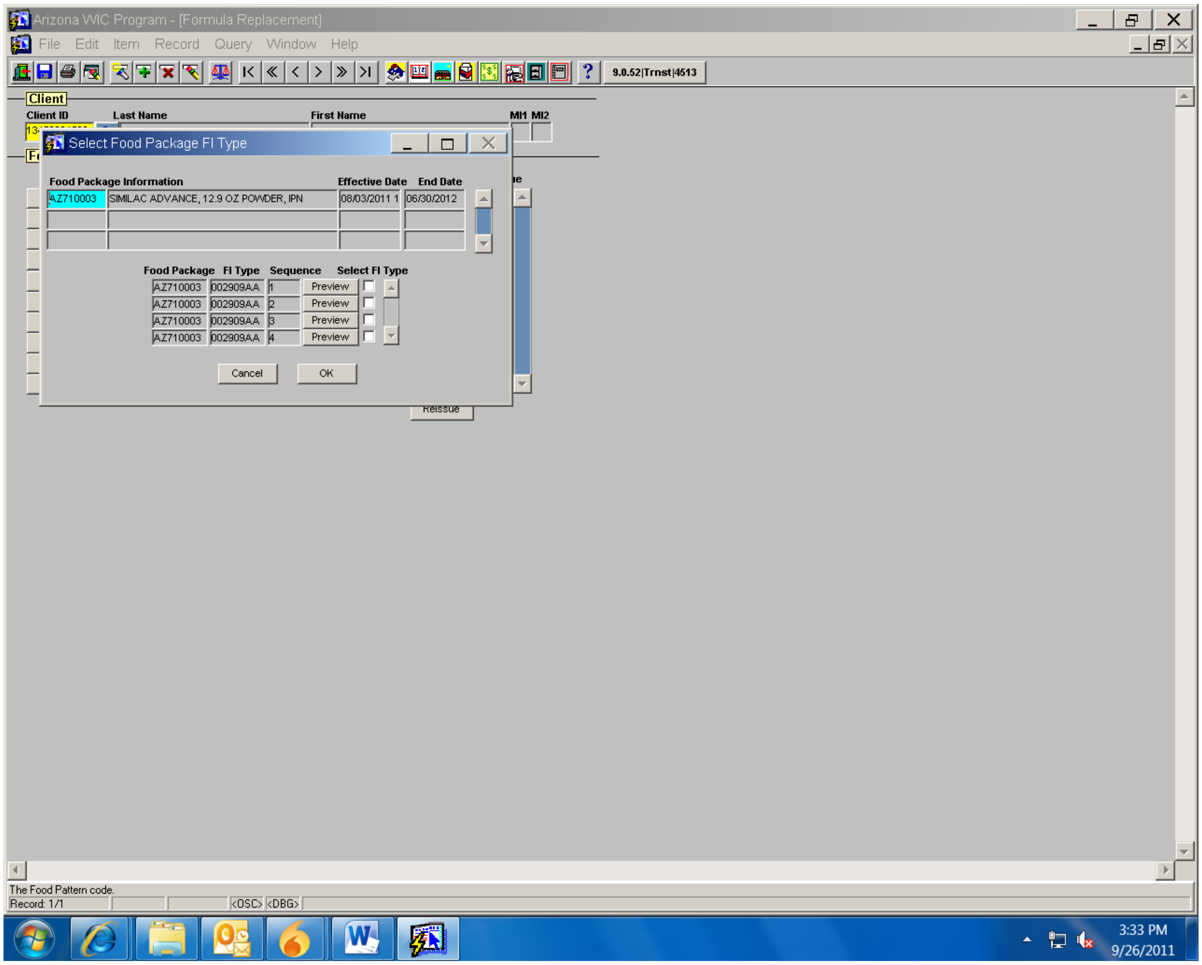


Figure 96 - Select Food Package FI Type Pop-up

18 All food packages not disabled are displayed in the Food Package Information section. Select the appropriate food package.

19 The Food Package, FI Type and Sequence are displayed below the food package information.

20 Use the Preview button to determine the correct FI you want to use as the replacement.

21. Check the Select FI Type box next to the correct FI.

22. Click OK.

23. Check the Reissue box next to the FI to be replaced.

24. Click the Reissue button in the lower right hand corner. The new FI will be printed.

25. Acknowledge the transaction. The new FI is now displayed in the Food Instruments section.

26. The replaced food package has been automatically voided.

27. Exit the screen.

Appendix A – Reports[1]

Operations Management

To produce reports:

1. Click the Operations Management icon on the Master Menu.
2. Click Outputs on the Operations Management main menu.
3. Click Reports.

The following reports are listed:

Report Name	Description	State Level Only Yes/No
Local Agency Directory	Produces either an internal or external directory of all Local Agencies and their associated clinics	No
Local Agency Staff Listing	Produces a listing of all staff members assigned to a Local Agency as well as all vacant positions	No
Outreach/Referral Organization Listing	Produces a general listing of Outreach/Referral Organizations and the program categories for which they provide services	No
Nutrition Education Contacts	Summary of nutrition education contacts by Local Agency for a user specified range of dates	No
FNS 648 Local Agency Directory	Produces the FNS 648 Local Agency Directory for submission to the FNS	Yes
Food Instrument Usage	Listing of the number of FIs with each type of disposition within a date range. This report is a Financial Management report, but is made available to Local Agencies here	No
Participant Status	Report on selected characteristics of the WIC or CSF participant population used to measure changes and trends for predicting caseload patterns. This report is a Financial Management report, but is made available to Local Agencies here	No
Personnel Costs Summary	Details the personnel costs for each staff member based upon activity categories. This is a Financial Management report, but is made available to Local Agencies here.	No
Annual WIC Cost Summary Sheet	Report generated from the data entered on the Annual WIC Cost Summary window	Yes

[1] Only reports that are fully functional are listed in the tables.

System Administration

To produce reports:

1. Click the System Administration icon on the Master Menu.
2. Click Outputs on the System Administration main menu.

The following reports are listed:

Report Name	Description	State Level Only Yes/No
WIC Role Authorities	The purpose of this report is to provide the System administrator with a breakdown of the currently established roles, the tables that each role has access to, and the privileges of each table.	No
WIC User Directory	The purpose of this report is to provide a listing of all current WIC/CSFP users, their associated roles, and their password expiration dates. This will provide the System administration, and any required supervisors, with the ability to create and view a hard copy of all users.	No
Expired Passwords	The AIM System will monitor and list all users whose password has expired. The purpose this is for the administrator to consider deleting the user since the account is not accessible. Unused accounts may propose a security risk.	No
WIC Active and Inactive Roles	The AIM System will provide a listing of WIC/ CSFP roles and reference these roles as “Active” or “Inactive.” This will give the administration a “quick view” capability as to which privileges associated with these roles are entered.	Yes
System Access	The AIM System will provide a listing of all accesses to the applications that were denied, and the reason for the denial.	Yes
Pending Certification Records	The AIM System allows the user to produce a report detailing the participants entered in the AIM System who have begun the certification process, but have not been issued food instruments. This report is not to include Breastfed infants who are scheduled not	No

Report Name	Description	State Level Only Yes/No
	to receive food instruments.	

Food Instrument

To produce reports:

1. Click the Food Instrument icon on the Master Menu.
2. Click Outputs on the Food Instrument main menu.

The following reports are listed:

Report Name	Description	State Level Only Yes/No
Active Food Package Listing	This report lists the food packages that are active.	No
Daily Food Instrument Log	This report lists the food instruments issued for Local Agency and Clinic.	No
FIs Voided and Cashed	This report produces a list of food instrument serial numbers that have been voided yet cashed.	No
Food Instruments Voided	This report produces a summary list of voided food instruments with void reasons.	No
Food Instrument Issuance	This report can be run for a single or all dispositions of issuances, and for a single or all Local Agency. It reports on the food instruments issued, the clients they were issued to, the associated food package type, the food instrument count, and the disposition of the issuances.	No
EOD Batch Log	Details each time the Batch Food Instruments function was invoked. This report is produced daily at the Central Site during End of Day process whether or not the function was used.	Yes
Master Subordinate FI Type	Displays all FI Types that have duplicates and each duplicate (subordinate FI type).	No
Food Package Composition	Displays food package content, including the FI types and the foods that make up each FI type.	No
Lost/Stolen WIC Food Instrument	Displays all lost or stolen FIs.	No
Plus Category Food Package	This report lists the food packages assigned to the plus WIC categories.	No

Appendix B – Worksheets

Discussion:

Creating a calendar/schedule for a clinic is a simple process if you have the necessary data prepared to enter into the system. Data on staff, services and time parameters must be entered into the system. The following worksheets have been created to assist with this process. Planning the schedule and completing the worksheets first will help ensure the calendar is created correctly and eliminate errors during the process. It is suggested you make copies of these worksheets for future use. Each worksheet corresponds to a specific window in the AIM System. The title of the worksheet reflects the title of the window and the key at the top of the sheet indicates the navigational path.

Staff Data

Navigation Key

Operations Management ➔ Operations Mgt.➔ Staff Data

Staff Information			
Position Number			
Type of Position	Vacant	Pseudo	Non- WIC
Last Name			
First Name			
Middle Initials			
Educational / Professional Suffix			
LA Coordinator	Yes	No	
Non – WIC Contractor	Yes	No	
Street Address			
City			
Zip Code			
Phone Numbers			Type
E-Mail Address			
Languages			
Job Description Information			
Program			
Position Title			
Salary			
ERE%			
Start Date			
Hrs/Week Budgeted			
FTE Base if different than 40 hours			
Home Organization			

Establish Office Hours

Navigation Key:

Setup ➔ Clinic Tables ➔Establish Office Hours

Clinic Name:

Day	Open	Close

Clinic Services/Activities

Navigation Key:

Setup ➔ Clinic Tables ➔Clinic Services/Activities

Clinic:________________________

Clinic Interval:__________________

Work Events:

Time Allotment **Service/Activity**

Minutes

Dates Office Closed

Navigation Key:

Setup → Clinic Tables →Dates Office Closed

Date	**Office Closed (reason)**

Staff Day Activities/Services

Navigation Key:

Setup ➔ Staff Schedule ➔Staff Day

Staff

Staff Alias:___________ **Name**:________________________________

Staff Activities/Services:

Clinic	Day of Week	Hours Service Offered	Staff Activity/Service
i.e. 88	i.e. Monday	i.e. 8am – 10am	i.e. certifications
i.e. 88	i.e. Monday	i.e. 10am – 12pm	i.e. medium risk cnsl

Staff Scheduler (Monthly)

Navigation Key:

Setup ➔ Staff Schedule ➔Staff Scheduler

Staff Alias:____________

Name:____

Date:____________________

Schedule

Clinic	**AM Start Time**	**AM End Time (lunch)**	**PM Start Time (lunch)**	**PM End Time**	**Days of the Week**	**Months built**
i.e. 88	**8am**	**12pm**	**12:30pm**	**4:30pm**	**M – Th**	**Sept – Dec.**

Edit Scheduler (Daily)

Navigation Key:

Setup ➔ Staff Scheduler ➔Edit Schedule (used for staff schedules that you only want to schedule a day at a time)

Staff Alias:____________

Name:____

Month:________________________________

Clinic	Service/Activity	Start Time	End Time	Day of Week

Classes

Navigation Key:

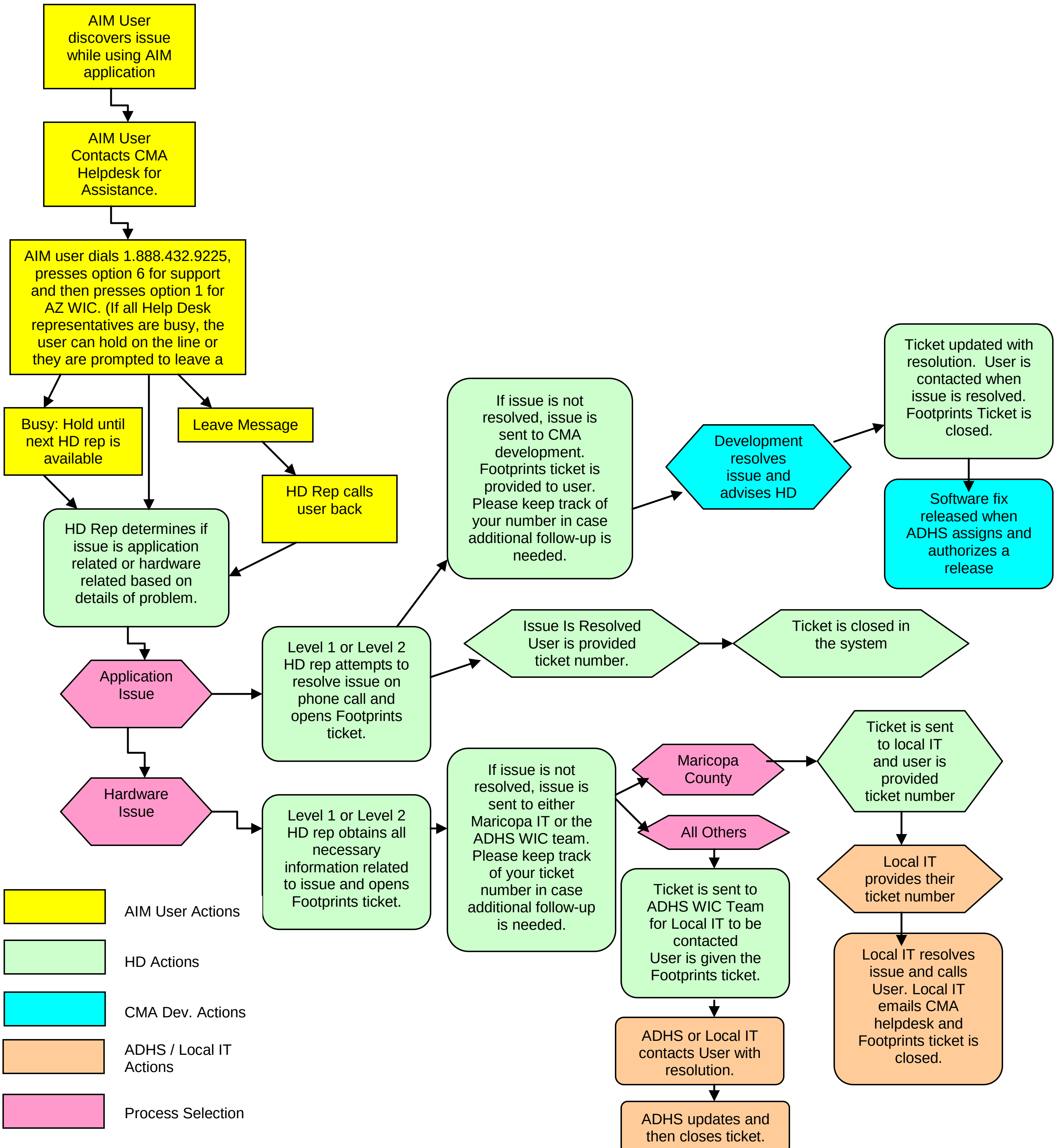
Setup ➔ Classes ➔Class Day/Schedule Class Day

Clinic:________________________

Class Day:______________________________

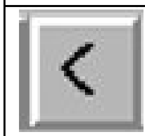
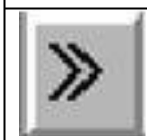
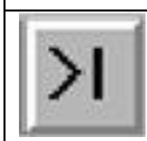
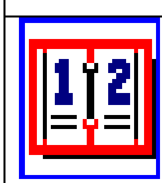
Class Category	Class Name	Start Time	End Time	Staff	Days of the Week	# of Months to Build

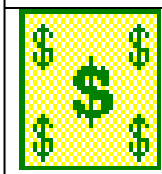
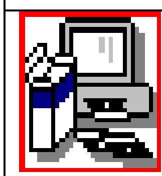
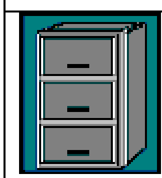
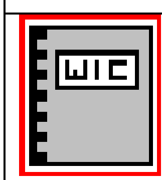
Appendix C – Daily Help Desk Process for AIM Users



Appendix D – Toolbar Quick Reference

Icon	Icon Name	Description/Task
	Exit	This icon allows an easy way to Exit the current window.
	Save	This icon allows you to Save the record.
	Print	This icon runs a report if one is attached to the window.
	Clear Form	This icon allows you to Clear the Form in the current window.
	Query	This icon allows you to search for a specific record. It is also called the Query button.
	Insert Record	This icon allows you to Insert an additional Record.
	Remove Record	This icon Remove a Record. When this button is pressed, the record is removed from the window and if the save button is pressed, the record deleted from the database
	Clear Record	This icon allows you to Clear a Record.
	First Record	This icon allows you to move quickly to the First Record.

Icon	Icon Name	Description/Task
	Scroll Up	This icon allows you to quickly Scroll Up one set of records displayed on the window.
	Previous Record	This icon allows you to move to the Previous Record.
	Next Record	This icon allows you to move to the Next Record.
	Scroll Down	This icon allows you to quickly Scroll Down one set of records displayed on the window.
	Last Record	This icon allows you to move quickly to the Last Record.
	Mid-Certification Health Check	This icon turns red as a reminder to you that the participant is in need of a Mid-Certification Health Check.
	Help	This icon allows you to receive online Help if it is available.
	Certification and Enrollment	This icon allows you to switch to the Certification and Enrollment module.
	Appointment Scheduler	This icon allows you to switch to the Appointment Scheduler module.

Icon	Icon Name	Description/Task
	Vendor Management	This icon allows you to switch to the Vendor Management module.
	Food Instruments	This icon allows you to switch to the Food Instruments module.
	Financial Management	This icon allows you to switch to the Financial Management module.
	System Administration	This icon allows you to switch to the System Administration module.
	Operations Management	This icon allows you to switch to the Operations Management module.
	Reports	This icon allows you to switch to the Reports module.